ePlans Comprehensive User Guide

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eplans
MontgomeryPlanning

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INTRODUCTION

About This Document

ePlans is a powerful tool that streamlines the design review process and improves accountability among all of the process's participants. The review process and the software have been set up to maximize flexibility, allowing the Project Manager the ability to utilize as many or as few of the available features as he or she is comfortable with. While each project begins with a standard template, that template can be modified to meet the specific needs of each individual project.

The intent of this document is to provide an overview of the core components of ePlans and to guide all ePlans users through a standard document review process, known as a Workflow. As you gain proficiency with ePlans, you will discover many advanced functions and features throughout the software that are not covered in this guide. While ePlans is the term commonly used by M-NCPPC for this software, this manual also refers to it as ProjectDox, the software's proprietary name. The terms are used interchangeably throughout this manual and within the software.

This manual is organized into six main sections: an Introduction, Getting Started, the Workflows, Other Functions, the Appendix and the Glossary. The document starts with general information about ePlans, progressing to more specific descriptions of individual functions within the system. Read the Introduction and Getting Started sections before using ePlans to gain a general understanding of the purpose and function of the system. Once you begin to use ePlans, you can refer to the information in the Workflow and Other Functions sections as it pertains to your specific role in the Workflow.

Introduction: This section provides an overview of the purpose and function of ePlans within the Park Development Division's design review process. It also defines the roles of the various user groups, introduces the Workflow and provides some quick reference tools.

Getting Started: Your computer must be properly configured to run ePlans. Before you begin, consult the Technical Requirements checklist. This section will also guide you through the process of creating a login and password for ePlans.

Workflows: The Workflow is the business process for design review established by the Park Development Division, translated into the customized ePlans platform. This section is divided into four subsections that relate to the five user groups in the Workflow: Project Manager, Consultant, PDCO Team, QAP Officer and Division Chief. Refer to the subsection for your user group for step-by-step instructions to complete each of your tasks in the Workflow.

Other Functions: ePlans contains several functions that can be used outside of the Workflow. This section provides a guide for using many of these tools.

Appendix: The Appendix contains additional technical information that provides some troubleshooting instructions to ensure ePlans functions properly on every user's machine. Network Administrators are the primary audience for the Additional Technical Information.

Glossary: As you read this manual, refer to the Glossary to understand the ePlans-specific terminology.

In addition to this Comprehensive Guide, there are several other reference documents that provide more in-depth information about ePlans and its various functions.

- The key steps within the Consultant and PDCO Team workflows are animated in a video. The online training video can be found at http://montgomeryparks.org/pdd/eplans/story.html
- While you are inside the ePlans platform, you can click on the Help icon on the main toolbar (see the "Getting Started" section of this guide). There is a lot of useful information in the ePlans help site that is not covered in this manual. Use the index or search functions to find instructions on specific aspects of ePlans.
- The Brava Tool Tips user guide provides you with an in-depth description of all of the features that are available in the Brava Viewer. The user guide is available online, at the following address: ftp://ftp.informgraph.com/brava/Brava_7.0_Tool_Tips.pdf
- A training presentation has been created by Avolve Software and was given to Project Managers and PDCO Team members when ePlans was initially launched. Contact a Network Administrator for a copy of this presentation.

Purpose

ePlans is an online document review, storage and submittal platform created by Avolve Software and tailored for the Park Development Division (PDD) of the Montgomery County Parks Department. ePlans allows PDD Project Managers the ability to organize and formulate comments for Consultants based on feedback from the Planning, Design, Construction and Operations (PDCO) Team.

By using ePlans to create online, virtual project workspaces, you enable people from across divisions at different locations, disciplines and schedules to share the same information at the same time, facilitating communication and higher productivity.

Here is what ePlans does to enable online project information management:

- All of the shared project information (documents, drawings, 3D models, annotations, project Email, discussion threads, and faxes) is centralized in one location so it is visible, accessible and usable by everyone who needs it.
- The user-friendly interface makes it easy for users at all technical skill levels to leverage the "power tools" in ePlans.
- Permissions and roles-based security restrictions are configured and applied so that only appropriate personnel have access to project information, as well as subsets of that information.
- Using electronic Workflows and eForms, the flow of critical information from one person to the next is tightly controlled in order to maintain schedules and enforce accountability.
- ePlans uses version control to track changes within a document.
- Automation features make sure that when activity takes place in the workspace, those who need the updated information are informed immediately.

- Plan, document and markup viewing tools, online discussions, and group Email provide for timely information and a more productive review for the whole team.
- Complete details of all workspace activity are recorded, comprising a complete audit trail for documents, Email, annotations and markups, Workflows and forms, access and egress, plus much more.

In summary, ePlans allows the stakeholders in a project to manage information, communication, activity and resources better than manual or conventional means.

ePlans was brought to the Montgomery County Parks Department as part of a collaborative effort with the Montgomery County Planning Department. For the most part, the ePlans platform was tailored to meet the distinct needs of each department in the collaboration. Some shared elements could not be modified to individual department specifications, however, resulting in the occasional appearance of lines of text, instructions or nomenclature that is irrelevant to the Park Development process. Every effort has been made to minimize the occurrence of these elements, and none of them interfere with the Park Development Workflows or the Montgomery County Parks' ability to use ePlans.

Project Roles

This comprehensive guide is designed for anyone involved in the Park Development process that is responsible for reviewing design and construction documents using ePlans. ePlans users include Project Managers, Consultants, PDCO Team members, QAP Officers and External Stakeholders. Comments from External Stakeholders, such as state and county review agencies or members of the general public, will be coordinated by the Project Manager, generally outside of the ePlans Workflow.

PROJECT MANAGER

The Project Manager is a member of the Montgomery County Parks Department's Park Development Division and is responsible for overseeing all aspects of park development projects. The Project Manager will initiate a Workflow and will hold accountable the entire project team for completing their tasks. The Project Manager will also serve as a PDCO Team member, reviewing and commenting on the Consultant's submissions. For design projects that are completed entirely by Park Development Division staff, the Project Manager will also handle the role of the Consultant, uploading drawings for review by the PDCO Team. ePlans often refers to "Project Managers" as "Project Administrators" in their help documentation.

CONSULTANT

The Consultant is a person or group hired by the Park Development Division to complete a set of contract documents for a specific park development project. The Consultant is responsible for uploading his or her documents to ePlans for review by the Project Manager and the PDCO Team. The Consultant will also receive and respond to comments made by the Project Manager and PDCO Team. For design projects that are completed internal to the Park Development Division, the Project Manager will fill the role of the Consultant.

PDCO TEAM

The Planning, Design, Construction and Operations (PDCO) Team consists of Montgomery County Parks' employees from various divisions whose work programs are directly impacted by a park development project. PDCO Team members will use their individual expertise to review and comment on a Consultant's drawings for accuracy and completeness. The Project Manager is always a part of the PDCO Team.

QAP OFFICER

The Quality Assurance Program (QAP) Officer is the last person to review a set of contract documents before they go out to bid. Following a standard checklist of requirements, the QAP officer ensures that a set of contract documents meets the standards set forth by Montgomery County Parks.

DIVISION CHIEF

Per Montgomery County Parks' contracting requirements, all contract documents must be approved by the Division Chief, who gives his or her approval by signing the cover sheet of the construction drawing set. He or she can use ePlans to apply a digital eSignature to the cover sheet, further streamlining the procurement process.

EXTERNAL

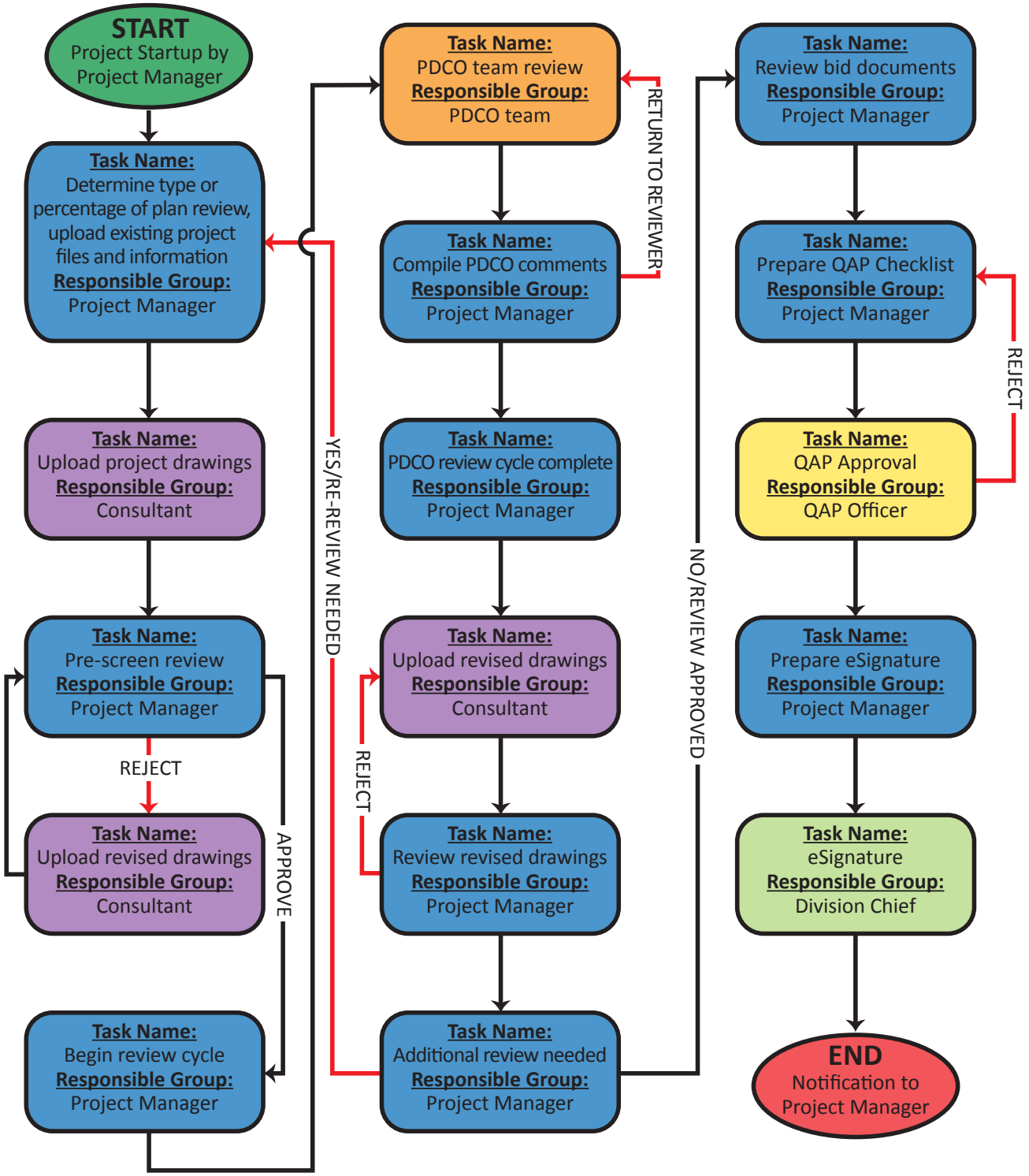
Any person or agency outside of Montgomery County Parks who has review authority over or is directly impacted by a project is considered part of the External User Group. Although a Project Manager can elect to provide external stakeholders with ePlans access, their review of a Consultant's drawings is usually conducted outside of the Design Workflow.

OTHER

The "Other" user group was created to provide a Project Manager with flexibility when creating his or her project team. This group can be used when assigning users to a project that may participate in a limited number of review cycles, or have special permissions, apart from those granted to other groups.

Workflow Overview

The flow chart below provides an overview of the steps involved in the ePlans review process. This chart is referred to as the Workflow.



Quick Reference

Below are some of the most common icons found throughout ePlans. You can also learn an icon's function by hovering your mouse pointer over that icon to see a brief description.

Project icons		Folder Icons		File Icons		Reprographics Icons	
	Revoke permissions		Delete Folder		Delete File		Add item to Cart
	Project Topics/Notes Exist. Project Topics/Notes don't Exist.		Find Topic or Note in Folder		Topics/Notes Exist. Topics/Notes don't Exist.		View/Print Shipping label
	Edit Project		Topic: Open/Edit		View File in Separate Window		Ordering not allowed
	View Project information		Add New Folder		View File in Pane		View Cart
	Send TeamMail to project or Single user		Rename Folder		Markup Exists for this File		Order Pending Ready to Ship
	Display calendar – Click to select date		Download Folder		Download File	Administration Icons	
	ProjectDox Help		View or Manage Folder Permissions		Move File(s) Copy File(s)		View or Edit User Permissions
	Refresh Page		Subscribe to this Folder for email Notification		Start Workflow against file		Edit Workflow Definitions
	User logged in Not logged in		Currently Subscribed to this Folder		Compare files		Setting not editable or closed
	Project GIStream		Inherit parent permissions		Check-In File Check-Out File		
			Arrange sort order		Copy internal/external markup link to Clipboard		
			Subscribed to a folder/ subfolders		Batch Stamp selected files		
			Edit selected folder metadata		View File History		
					File GIStream		

GETTING STARTED

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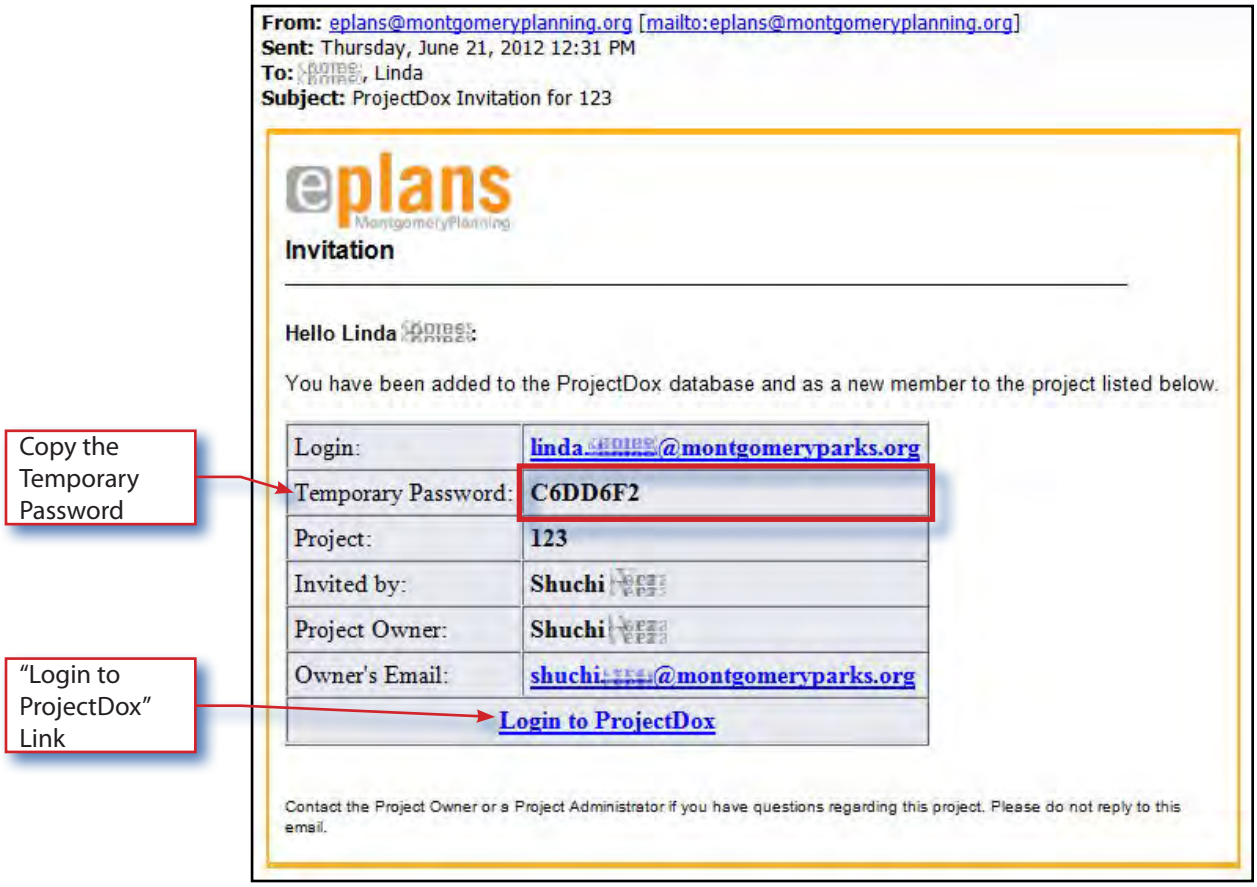
Technical Requirements

ePlans is designed to be a user-friendly program, understandable to anyone who possesses basic internet navigation skills and has a valid Email address. Before you begin, you will need to make sure you are using a computer that meets all of the minimum technical requirements necessary to run ePlans.

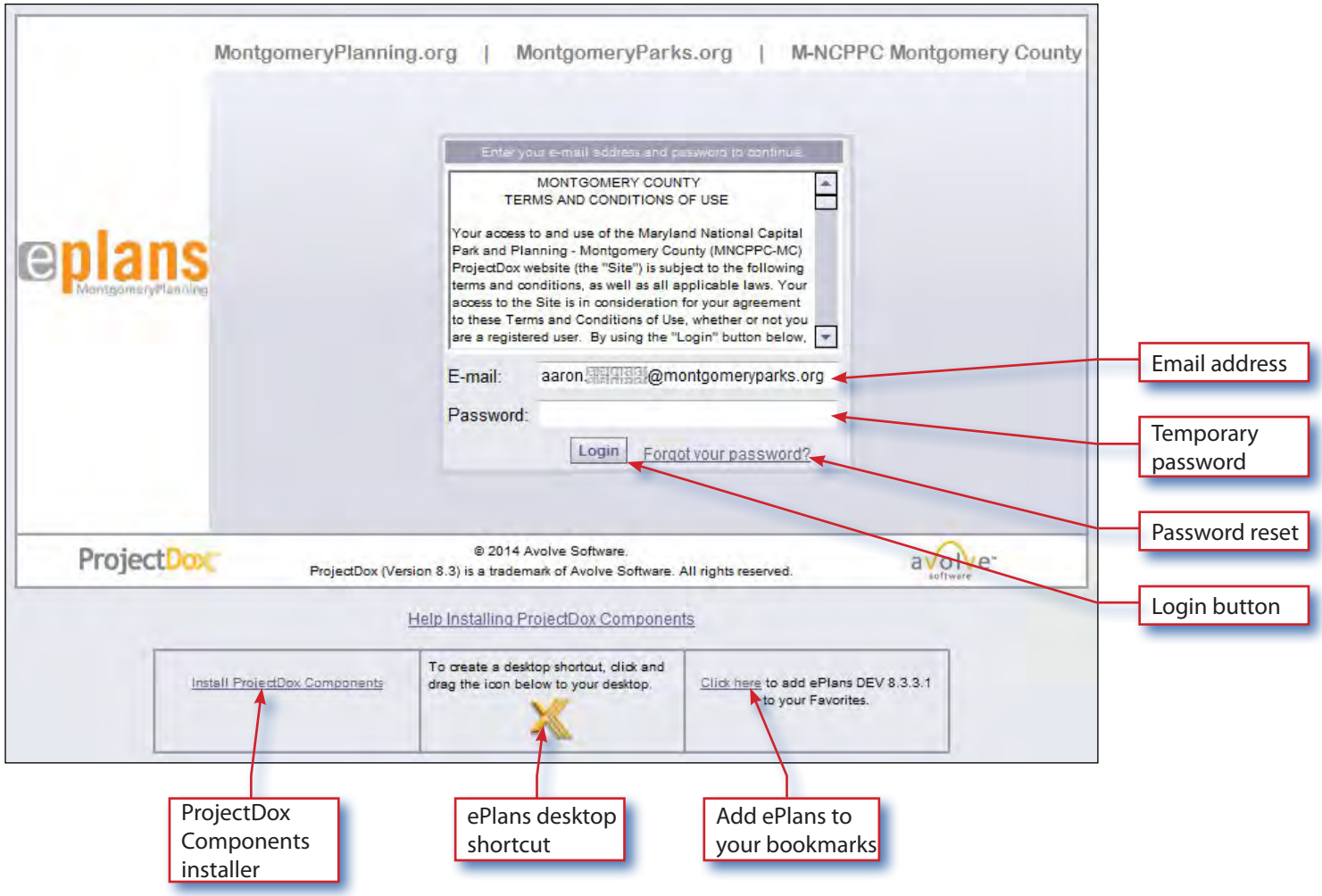
- A computer with a 32- or 64-bit processor.
- A high-speed internet connection, such as cable, DSL or 3G LTE.
- An up-to-date web browser with the Pop-Up Blocker turned off (see the Appendix for instructions on disabling the Pop-Up Blocker for Internet Explorer). Although ePlans is compatible with most web browsers, Changemarks and the Compare Tool can only be used with Internet Explorer.
- ProjectDox Components installed. To install ProjectDox Components, click the "ProjectDox Component Installer" link in the bottom left-hand corner of the login screen.

Logging In For the First Time

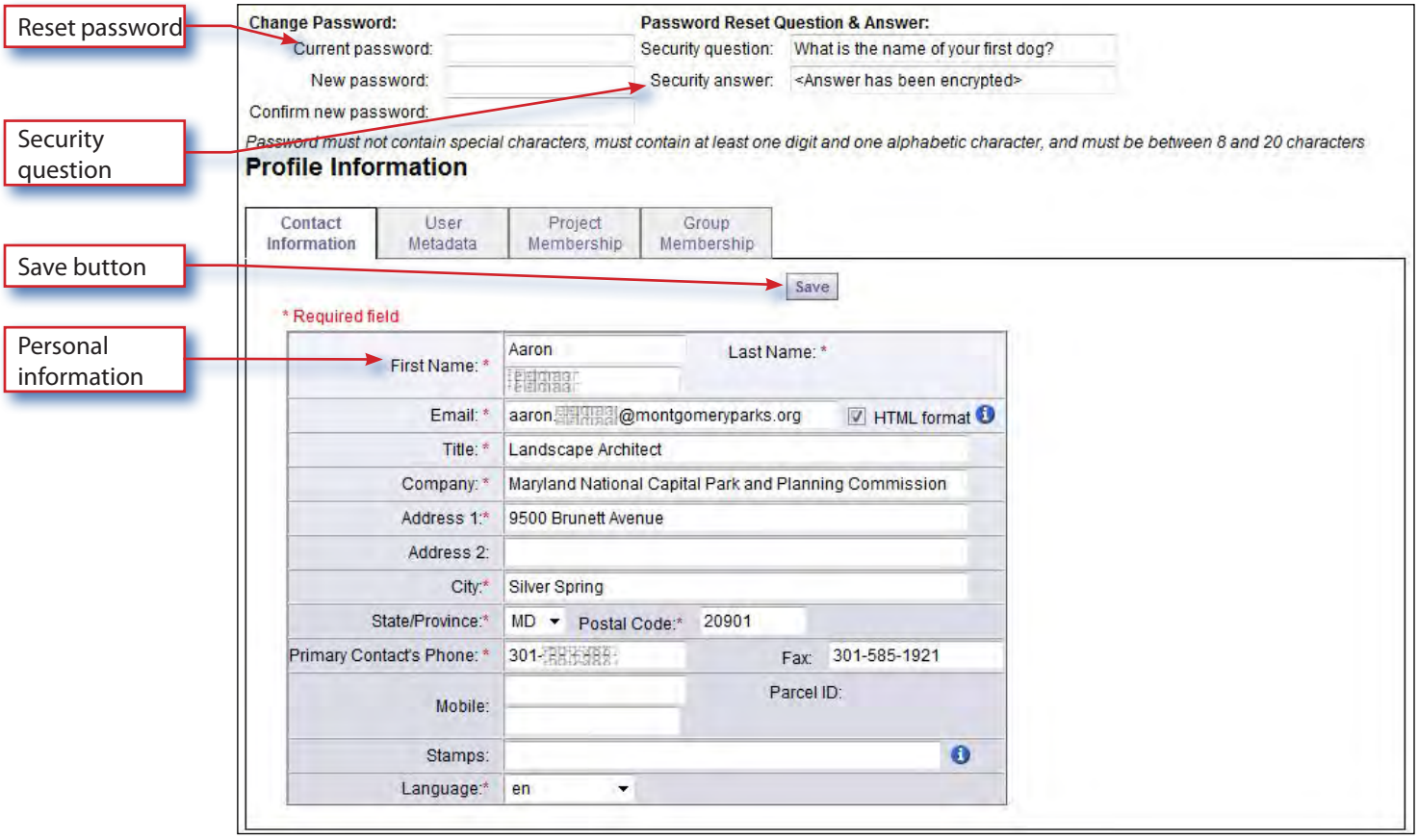
The first time you are invited to join a project on ePlans, you will receive an Email notification, similar to the one below. This Email will contain a temporary password and a link to ePlans.


Copy the Temporary Password
"Login to ProjectDox" Link
From: eplans@montgomeryplanning.org [mailto:eplans@montgomeryplanning.org]
Sent: Thursday, June 21, 2012 12:31 PM
To: [redacted], Linda
Subject: ProjectDox Invitation for 123
eplans
MontgomeryPlanning
Invitation
Hello Linda [redacted]:
You have been added to the ProjectDox database and as a new member to the project listed below.
Login: linda.[redacted]@montgomeryparks.org
Temporary Password: C6DD6F2
Project: 123
Invited by: Shuchi [redacted]
Project Owner: Shuchi [redacted]
Owner's Email: shuchi.[redacted]@montgomeryparks.org
Login to ProjectDox
Contact the Project Owner or a Project Administrator if you have questions regarding this project. Please do not reply to this email.

1. Copy the temporary password that was provided to you in the invitation Email.
2. Click the link that says "Login to ProjectDox." This will automatically open your default web browser and take you directly to the login screen. *You can also open your web browser and enter the address http://eplans.montgomeryplanning.org/ProjectDox.*
3. From the login screen, you will be given the opportunity to install ProjectDox Components, create an ePlans shortcut on your computer's desktop or add ePlans to your web browser's bookmarks. To complete any of these actions, Click on the appropriate links at the bottom of the login screen before logging in.
4. Enter your Email address (the same address from where you received the invitation to join the project) into the Email field.
5. Type or paste the temporary password into the Password field and click the Login button The password is case sensitive and must be entered exactly as it was provided to you in the invitation email.


MontgomeryPlanning.org | MontgomeryParks.org | M-NCPPC Montgomery County
Enter your e-mail address and password to continue.
MONTGOMERY COUNTY
TERMS AND CONDITIONS OF USE
Your access to and use of the Maryland National Capital Park and Planning - Montgomery County (MNCPPC-MC) ProjectDox website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of Use, whether or not you are a registered user. By using the "Login" button below,
E-mail:
aaron.[redacted]@montgomeryparks.org
Password:
Login
Forgot your password?
ProjectDox
© 2014 Avolve Software.
ProjectDox (Version 8.3) is a trademark of Avolve Software. All rights reserved.
Help Installing ProjectDox Components
Install ProjectDox Components
To create a desktop shortcut, click and drag the icon below to your desktop.
Click here to add ePlans DEV 8.3.3.1 to your Favorites.
Email address
Temporary password
Password reset
Login button
ProjectDox Components installer
ePlans desktop shortcut
Add ePlans to your bookmarks

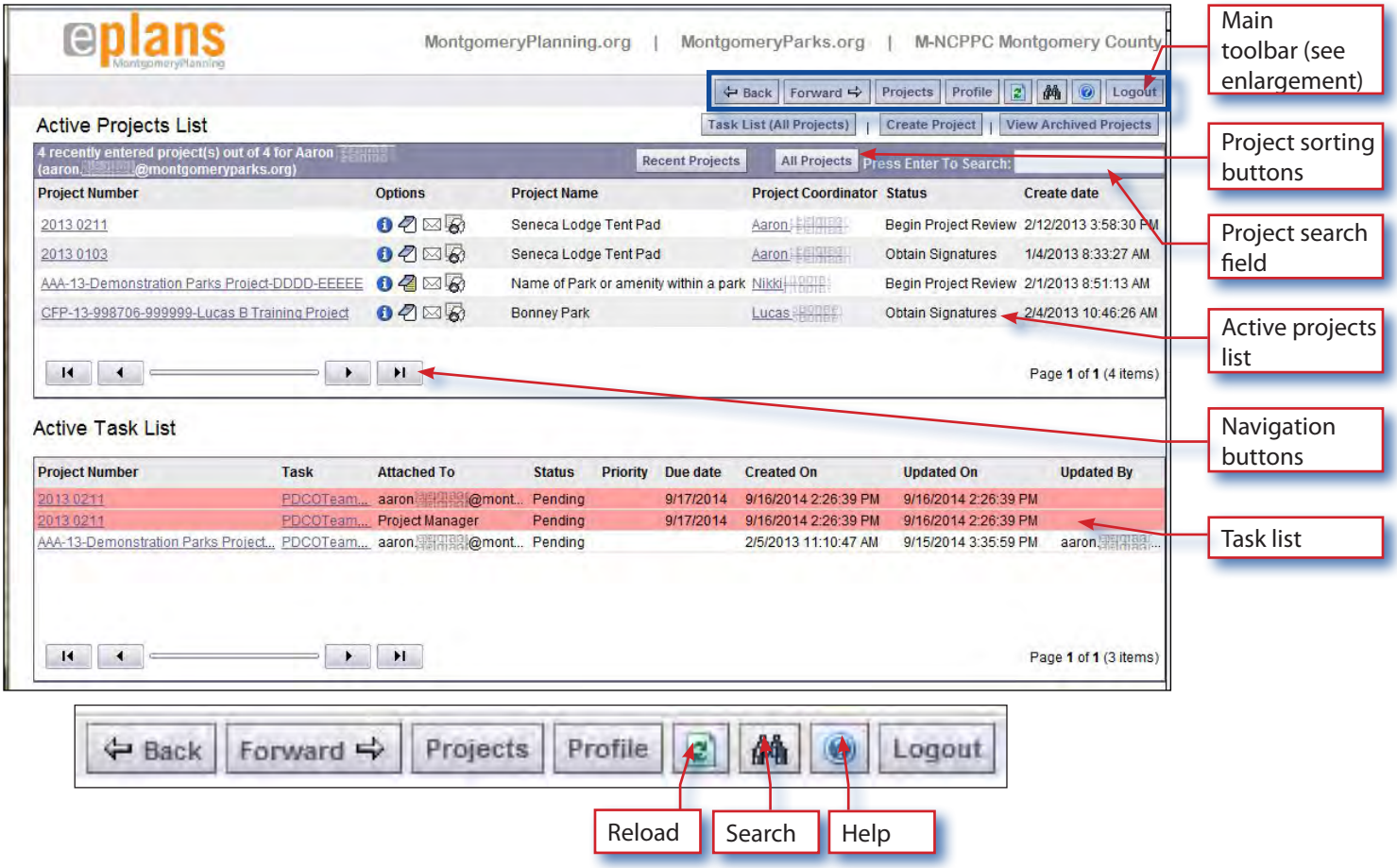
6. Once you successfully log in, you will be taken to your User Profile page, where you will need to reset your temporary password, create a security question and answer, and enter some additional information about yourself. Be sure to keep your new password in a safe place. The security question and answer are used to reset your password, should you ever forget it.
7. Fill in all of the required fields (those marked with a red asterisk*), and click the Save button. *Once logged in, you can return to this screen at any time by clicking the Profile button on the main toolbar.*
8. After saving your profile information, you will be directed to the Projects screen.



Logging In After The First Time

The second time you log in to ePlans, (and every time after that), you will use the password that you created in your User Profile page. If you ever forget your password, click the "Forgot your password?" link on the login page and you will be prompted to answer your security question. If you forget your security question, contact a System Administrator.

After logging in, you will be taken to the Active Projects screen. From this screen, you can view all of the projects you have created or been invited to, and all pending tasks for you to complete.



Active Projects Screen

Main Toolbar - This group of buttons provides your primary navigation functions. This toolbar will be visible on most ePlans screens. Most users will only see a single line of buttons, but Project Managers and System Administrators have a second row of buttons available for their use.

- The Back Back and Forward Forward buttons function much like the back and forward buttons on your web browser, taking you to the screen you previously or subsequently viewed.
- The Projects Projects button will take you back to the Active Projects screen from wherever you are.
- The Profile Profile button will take you to your User Profile, where you can edit your personal information or change your password.
- The Reload button will refresh the page you are currently on.
- The Search button allows you to search for keywords within all of your project's files, labels or titles. This feature is much more powerful than the Project Search field.
- The Help button takes you to the ProjectDox help site. There is a lot of useful information in the help site that is not covered in this manual. Use the index or search functions to find instructions on specific aspects of ePlans.
- The Logout Logout button logs you off of ePlans and takes you back to the Login screen.

Project Sorting Buttons - Clicking the Recent Projects button will show only those projects you have accessed within the past few days. Clicking the All Projects button will show all projects you have created or been assigned to. Clicking either of these buttons will clear any queries entered in the search field.

Project Search Field - Type in a keyword, or part of a keyword, and hit enter. Only projects with matches in the Project Number, Project Name or Project Coordinator fields will be shown. Click the "All Projects" button to return to your full projects list.

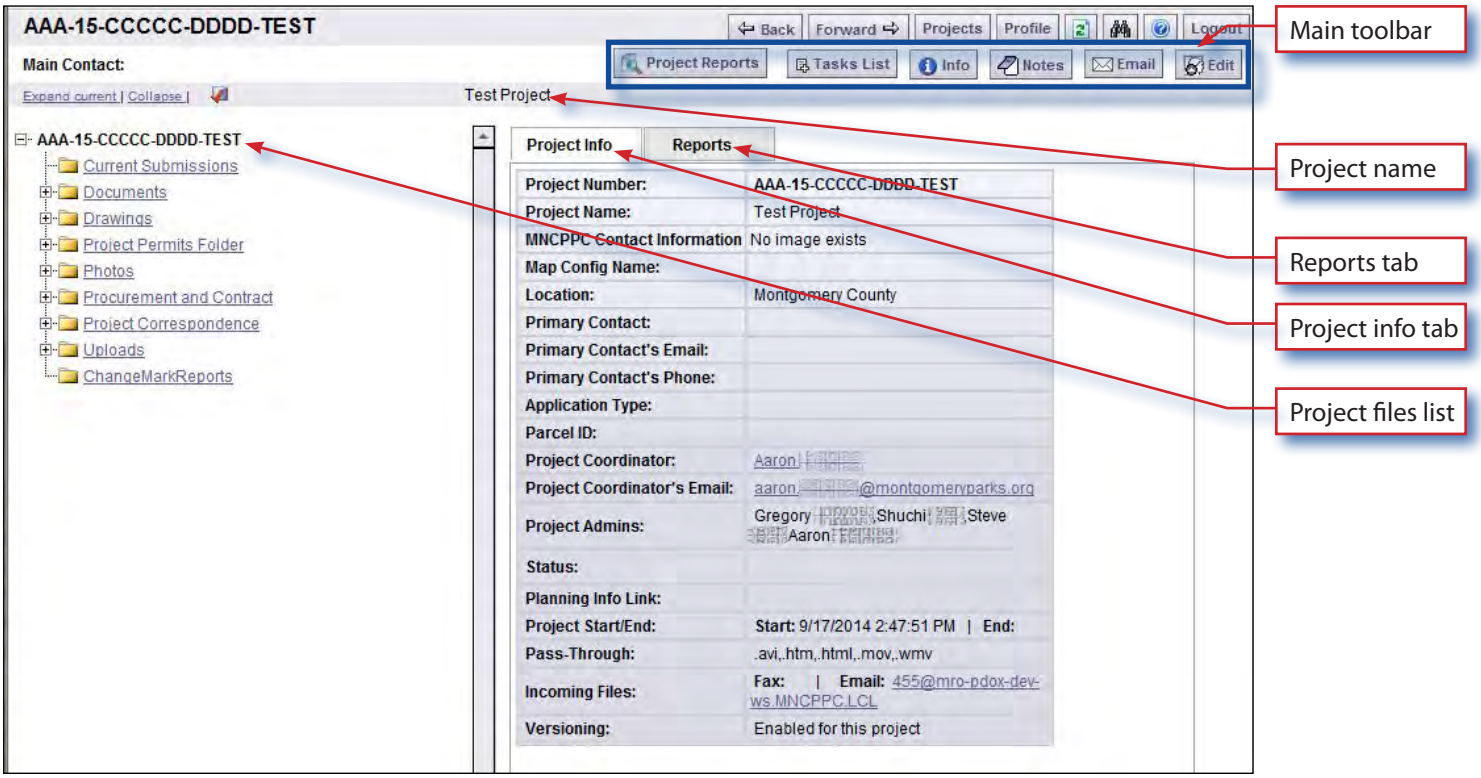
Active Projects List - The Active Projects List provides you with basic information about every project to which you are assigned. You can sort your projects by number, name, coordinator, status or creation date. Clicking the project number will take you to the project's main page.

Navigation Buttons - The Active Projects List and the Tasks List are set to display a limited number of entries at one time. You can use the navigation buttons at the bottom of each list to scroll through all of your active projects or tasks.

Tasks List - The Tasks List shows any tasks requiring your action across all of your projects. Clicking the task will take you to the eForm for that task; there you can get further instructions for completing the task. Tasks in red are past their due date.

Accessing Projects

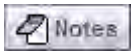
When you click on a project number in your Active Projects List, you will be taken to that project's main page. Here you can access all of the files that have been uploaded to that particular project, view project information and communicate with other members of the project team.

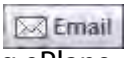


Main Toolbar - The top row of the main toolbar is identical to the main toolbar in the Projects screen. The bottom row provides a number of additional features.

- The Tasks List

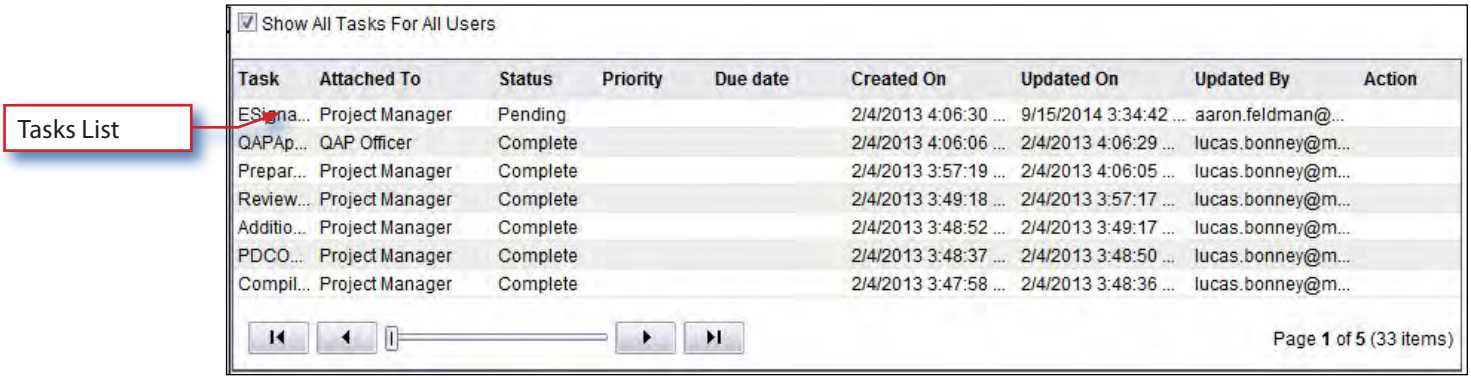
button will take you to a list of all of the tasks pending for this project. Project Managers and System Administrators have the ability to view all tasks for all members of the project team from this link by clicking the "Show All Tasks for All Users" checkbox above the Tasks List.
- The Info

button will display all of the project's information, including a roster of all the project team members, the groups to which they are assigned and the levels of permission they have. *Many of these fields will be left blank, as this is a screen also used by the Montgomery County Planning Department for their project review process.*
- The Notes 

button functions like a bulletin board, allowing users to create and share notes with the entire project team.
- The Email 

button allows you to send emails to individual members of the project team without leaving ePlans. *Email sent from ePlans will show up in the recipient's regular email inbox. The sender's email address will be the same address used to log into ePlans.*
- The Edit

button is only available to Project Managers and System Administrators and provides them with the ability to modify a project's users, folders and settings. For more information about the Edit button, go to the Project Manager's tab or to the Folder Management section of the Other Functions tab.


Tasks List
Show All Tasks For All Users
Task
Attached To
Status
Priority
Due date
Created On
Updated On
Updated By
Action
ESigna... Project Manager Pending 2/4/2013 4:06:30 ... 9/15/2014 3:34:42 ... aaron.feldman@...
QAPAp... QAP Officer Complete 2/4/2013 4:06:06 ... 2/4/2013 4:06:29 ... lucas.bonney@m...
Prepar... Project Manager Complete 2/4/2013 3:57:19 ... 2/4/2013 4:06:05 ... lucas.bonney@m...
Review... Project Manager Complete 2/4/2013 3:49:18 ... 2/4/2013 3:57:17 ... lucas.bonney@m...
Additio... Project Manager Complete 2/4/2013 3:48:52 ... 2/4/2013 3:49:17 ... lucas.bonney@m...
PDCO... Project Manager Complete 2/4/2013 3:48:37 ... 2/4/2013 3:48:50 ... lucas.bonney@m...
Compil... Project Manager Complete 2/4/2013 3:47:58 ... 2/4/2013 3:48:36 ... lucas.bonney@m...
Page 1 of 5 (33 items)

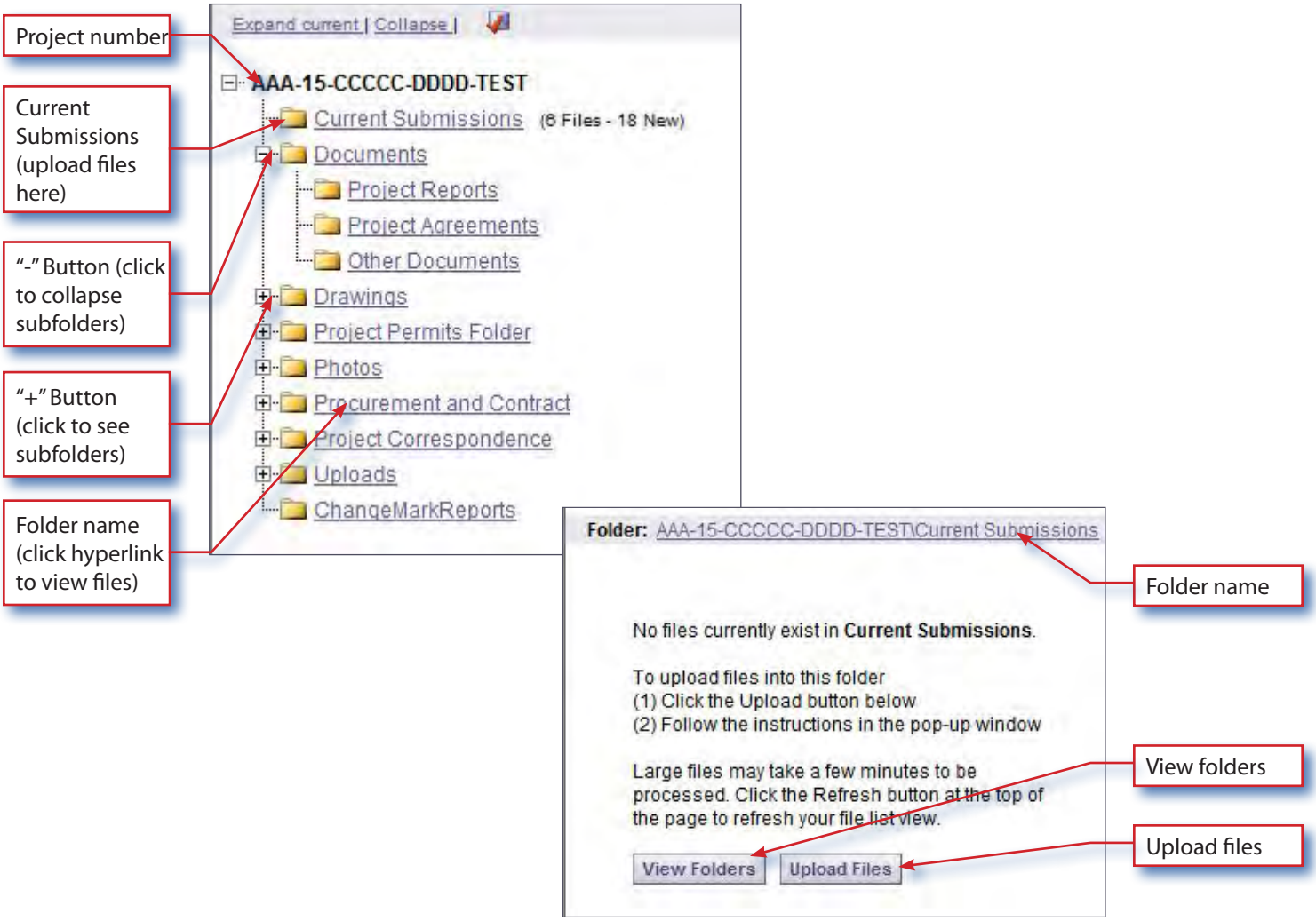
Project Name - The name of the project is always provided at the top of the screen, making sure you are always aware which project you are working in.

Reports Tab - The Reports list allows you to generate several types of reports of a project. See the Reporting section of the Other Functions tab for more information about reports.

Project Info Tab - Basic project information, entered by the Project Manager, is provided here. For most projects, many of these fields will be blank, as the information applies primarily to Montgomery County Planning Department users. Additional details about this tab are provided in the Project Startup task in the Project Manager's tab.

Project Folder List - The project folder section of ePlans functions much like the folders in Windows Explorer.

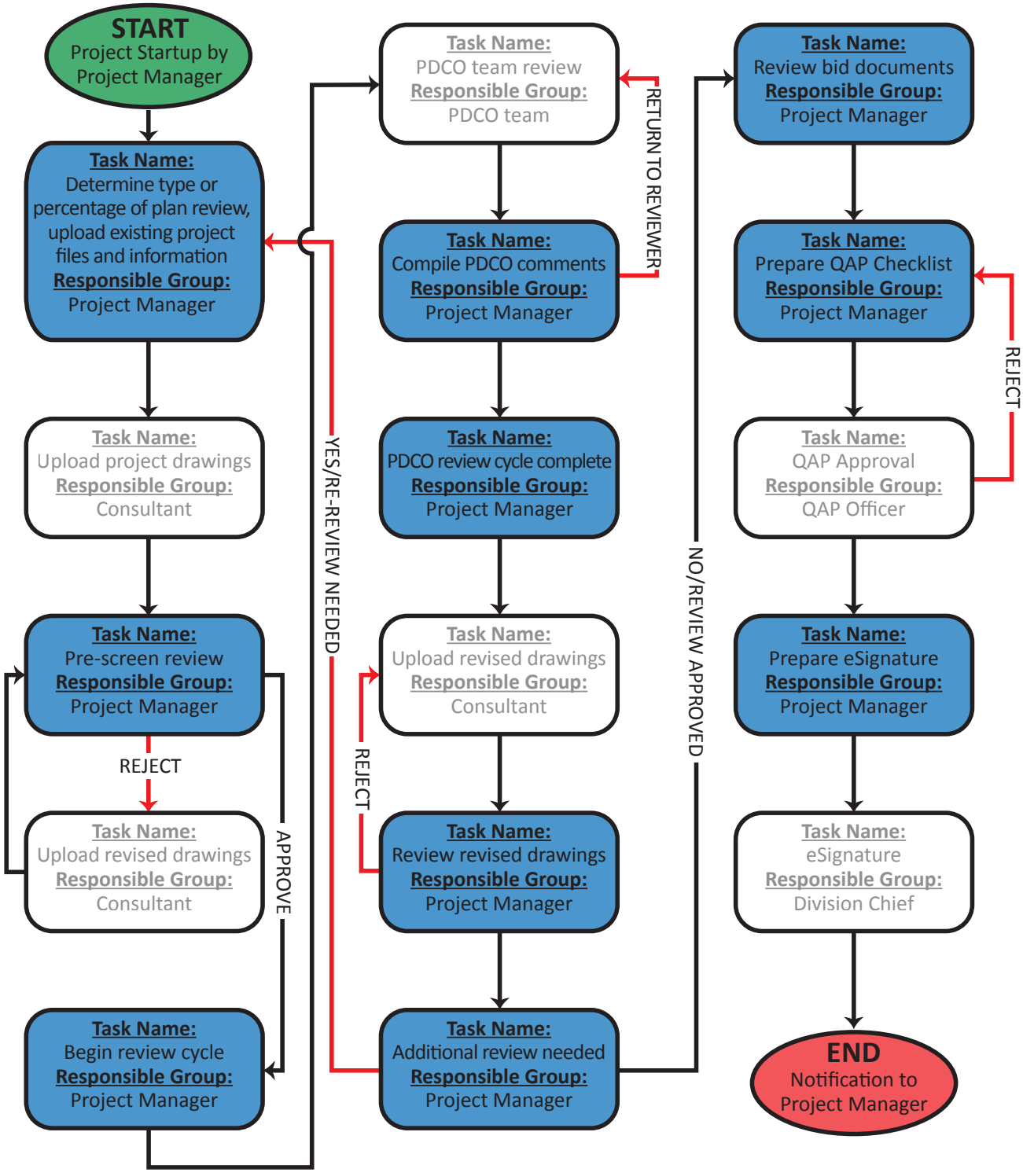
- Click the "+" icon to the left of the folder icon to see a list of subfolders contained within each folder.
- Click the "-" icon to the left of the folder icon to collapse the list of subfolders.
- Click a folder's name to view thumbnails of the files contained inside.
- The text (in parenthesis) to the right of each folder name indicates how many files are inside each folder and how many of those files were recently added. Empty folders do not have any text next to the folder name.
- If you click on an empty folder, a screen will appear notifying you that no files currently exist in that folder. Click the View Folders button to go back to the Project Files list, or click the Upload Files button to add files to that folder.
- *All files submitted by the Consultant for review by the Project Manager or PDCO Team should be uploaded to the "Current Submissions" folder at the top of the Project Files list.*


Project number
Current Submissions (upload files here)
"-" Button (click to collapse subfolders)
"+" Button (click to see subfolders)
Folder name (click hyperlink to view files)
Expand current | Collapse |
AAA-15-CCCCC-DDDD-TEST
Current Submissions (6 Files - 18 New)
Documents
Project Reports
Project Agreements
Other Documents
Drawings
Project Permits Folder
Photos
Procurement and Contract
Project Correspondence
Uploads
ChangeMarkReports
Folder: AAA-15-CCCCC-DDDD-TEST\Current Submissions
Folder name
No files currently exist in Current Submissions.
To upload files into this folder
(1) Click the Upload button below
(2) Follow the instructions in the pop-up window
Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your file list view.
View Folders
Upload Files
View folders
Upload files

WORKFLOWS:
PROJECT MANAGER

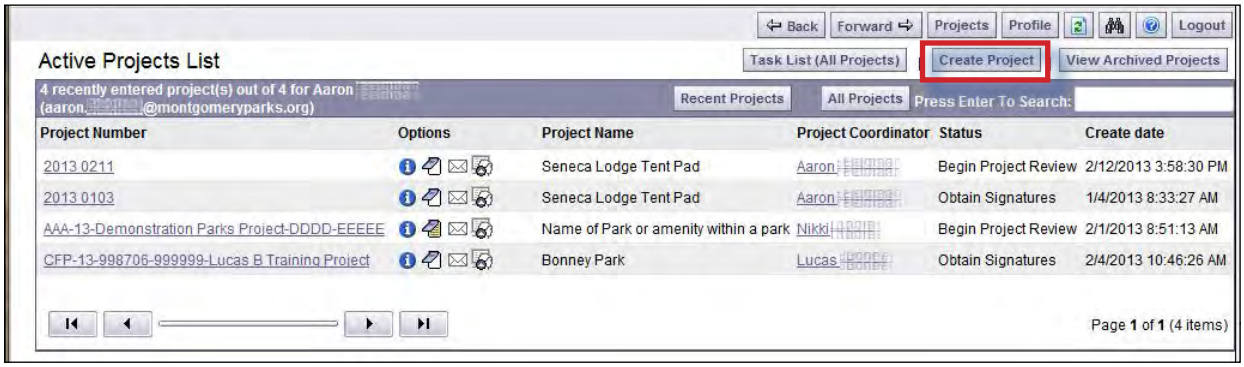
Project Manager

This section describes all of the Project Manager's tasks within the Workflow.



Project Startup

Before documents can be reviewed in ePlans, the Project Manager must first create a project, which stores all of the documents and comments, tracks the Workflow and distributes notifications to the project team members. All projects will start with the same basic Parks template, which you can modify to meet the specific needs of your project. You can add or remove folders, change group permissions, add project team members, assign roles and even skip tasks within the Workflow if needed. This section will walk you through the steps to create a project.



1. After logging in, the Projects screen will appear. Click the Create Project button on the main toolbar. This will take you to the Create Project form. *If you do not see the Create Project button on your screen, contact the System Administrator to change your privileges.*
2. The top four lines of the Create Project form (those marked with a red asterisk*) are required. The remaining lines are optional.

   Project Number - Enter a unique project identification code, using the following naming system:

   AAA-BB-CCCCCC-DDDD-EEEEEE, where:

   AAA - Three-character Park Facility Code. See the appendix for a list of Park Facility Codes.

   BB - The last two digits of the fiscal year in which the project is scheduled to begin. For example, enter "16" if a project is scheduled to begin design in fiscal year 2016.

   CCCCCC - Project Description Form (PDF) or other identifying number. If the project originated from another agency (such as a technical review or mandatory referral) use the number assigned by the sponsoring agency.

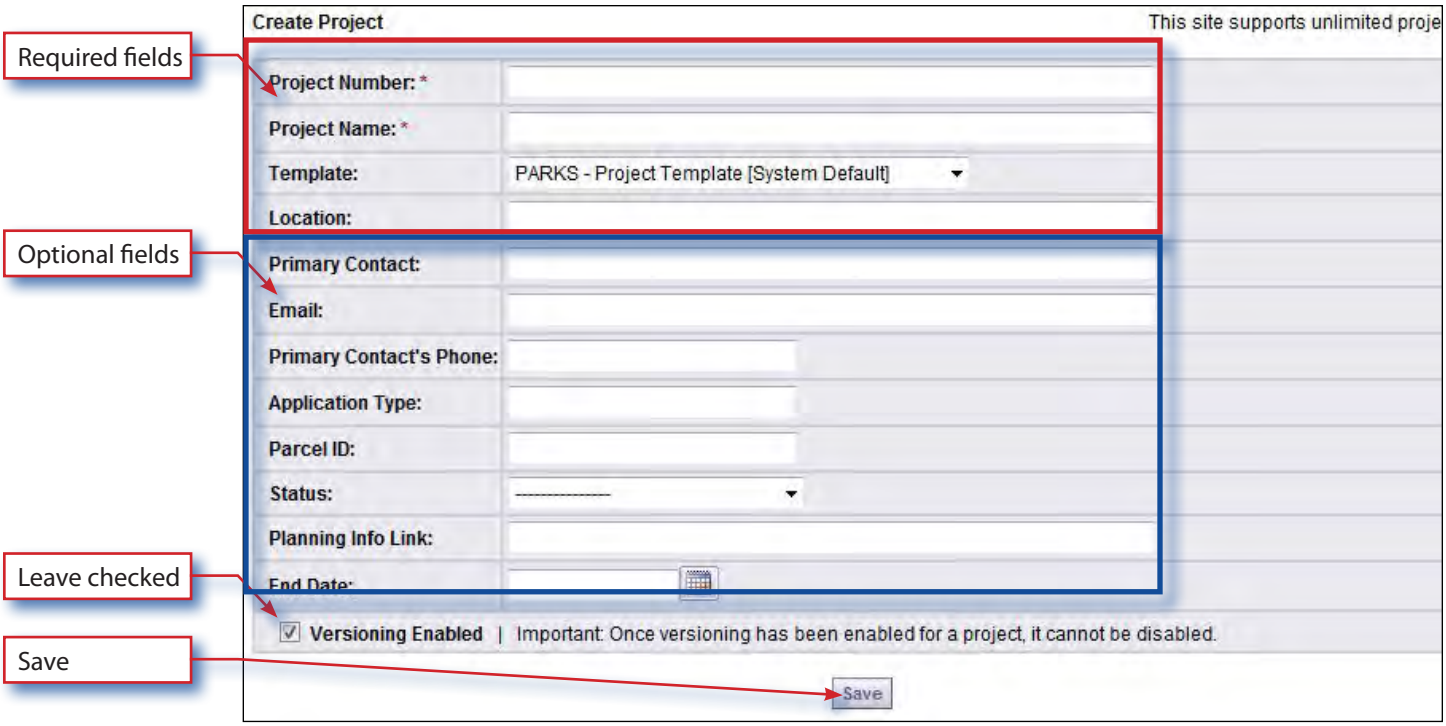
   DDDD - Three or four digit Project Tracking Database (PTDB) number. This is the number assigned to the project in the database the Park Development Division uses to monitor and communicate the progress of each park development project.

   EEEEEE - Project type, up to 50 characters. *Type in a short (2-3 word) description of the work to be done.*

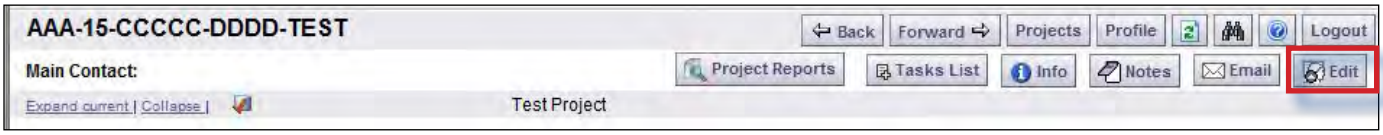
   Project Name - Enter the name of the project site. *This could be the name of the entire park or just one amenity within a park, depending on the scope of the project.*

   Template - Choose "PARKS - Project Template" from the dropdown list.

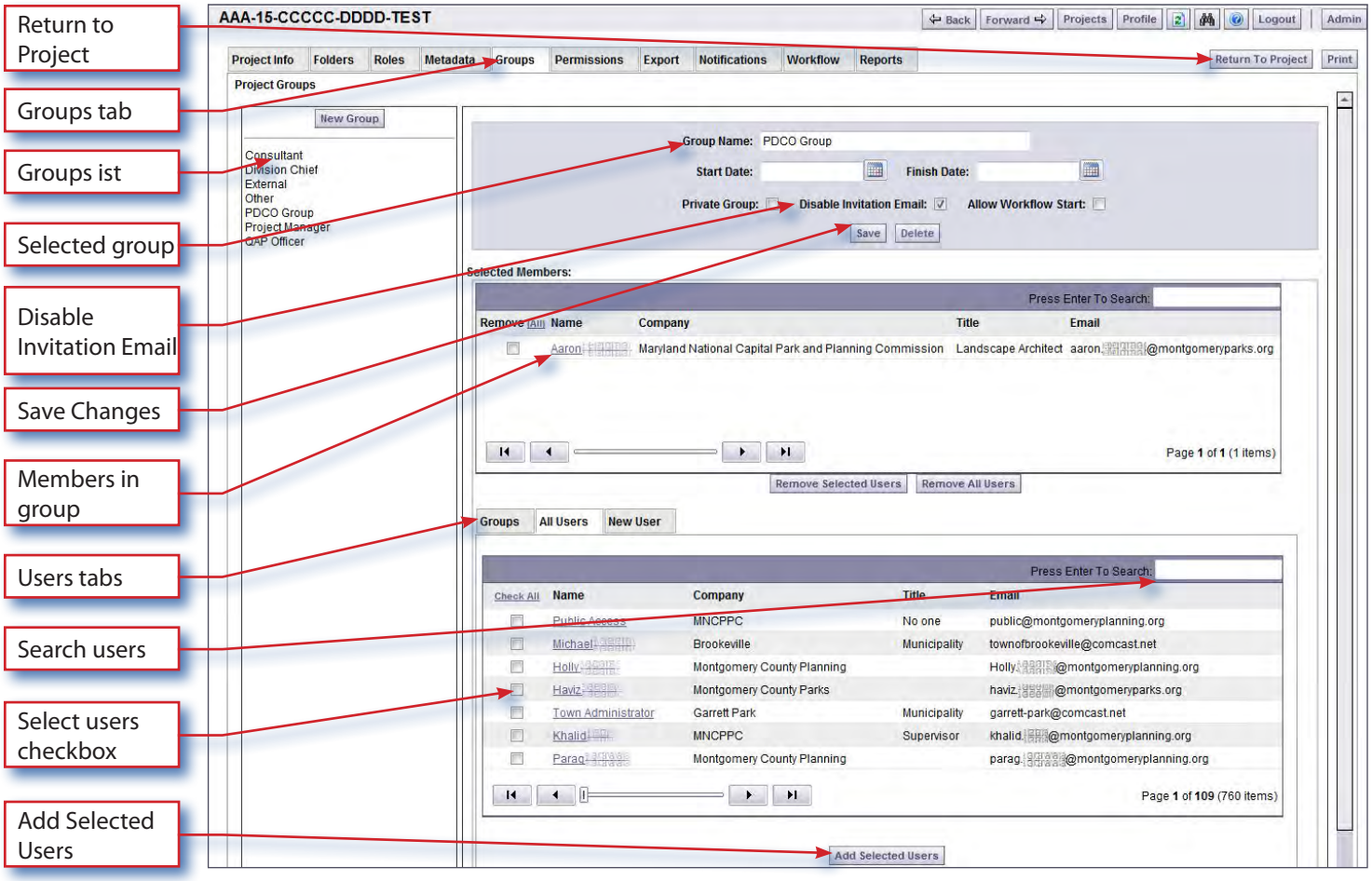
   Location - Enter the name of the park.



3. Click the Save Save button. This will take you to the newly created project's main page. *Once you click the Save button, ePlans will load all of the Parks template information into the project you just created. This may take a few moments.*
4. Click the Edit Edit button on the main toolbar to modify the project template and to add users to the project. You can add users at any time during the Workflow by going back to this button. *Adding users to the project allows others to view and comment on documents loaded into ePlans.*



5. Select the Groups tab at the top of the screen. The window on the left side of the screen will display a complete list of groups used in the design review process. Select the group you wish to add users to by clicking that group's name. ***Do not change or delete the group names as they are tied directly to the functionality of the Workflow.*** *Default roles and permissions have been assigned to each group, based on the Park Development Division's common business practices. You can modify any of these default settings by clicking the Permissions tab at the top of the screen.*

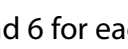


6. The menu at the bottom of this screen allows three options from which you can select users. You can select multiple users by checking the box next to each users' name. When you click the Add Selected Users button, all checked users will be added to the selected group.

   Groups - From the Groups tab, select a group from the drop down list to browse through a list of all of the Parks' employees or all of the Parks' consultants who have previously been invited to a project in ePlans. *This tab is useful if you do not know the exact spelling of someone's name.*

   All Users - After clicking the All Users tab, search for a user's name, using the Search Users tool in the top right corner of this box. Type the first few letters of a user's first or last name, and press the "Enter" key. All matching names will appear in the box below.

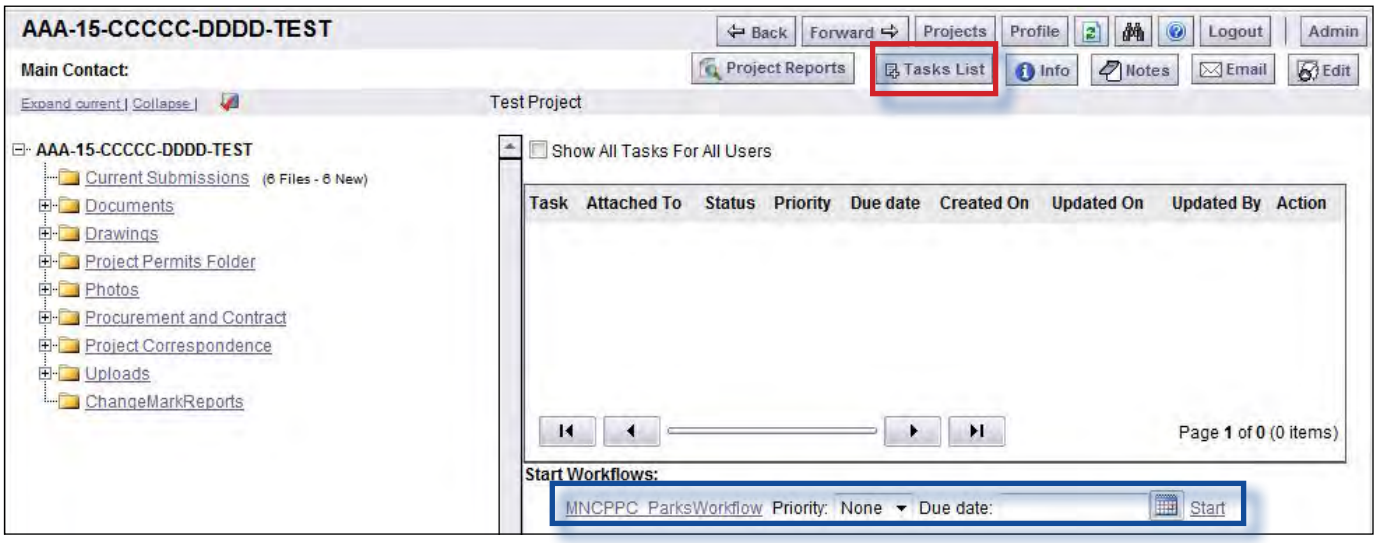
   New User - If the person you are trying to add does not appear on any of the user lists, you can create a new user in the New User tab. Enter the name and Email address of the new user and click the Invite button. Instruct this new user to follow the instructions in the Getting Started section of this manual.

7. Repeat steps 5 and 6 for each relevant group in your project, clicking the Save  button after you finish adding users to each group. ***Make sure to add yourself to both the Project Manager and PDCO groups.*** Uncheck the "Disable Invitation Email" box for any groups you want to receive an email telling them they have been added to the group. *This box is checked by default to cut down on email traffic.*

8. Once you have added all the necessary users, click the Return to Project

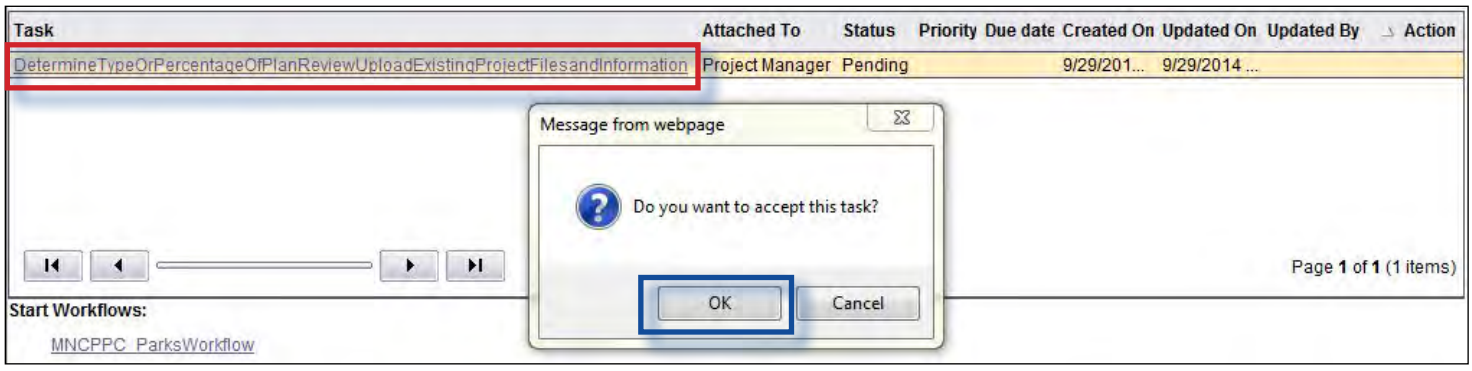
button in the main toolbar.
9. From the project's main page, click the Task List

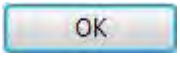
button in the main toolbar.
10. At the bottom of the page, click the "MNCPPC ParksWorkflow" link, and a "Priority" dropdown menu and "Due Date" field will appear. *Entering a priority and due date for the project are completely optional.*
11. Click the "Start" link to the right of the "Due Date Field."
12. Your first task should appear in your Tasks List shortly thereafter.

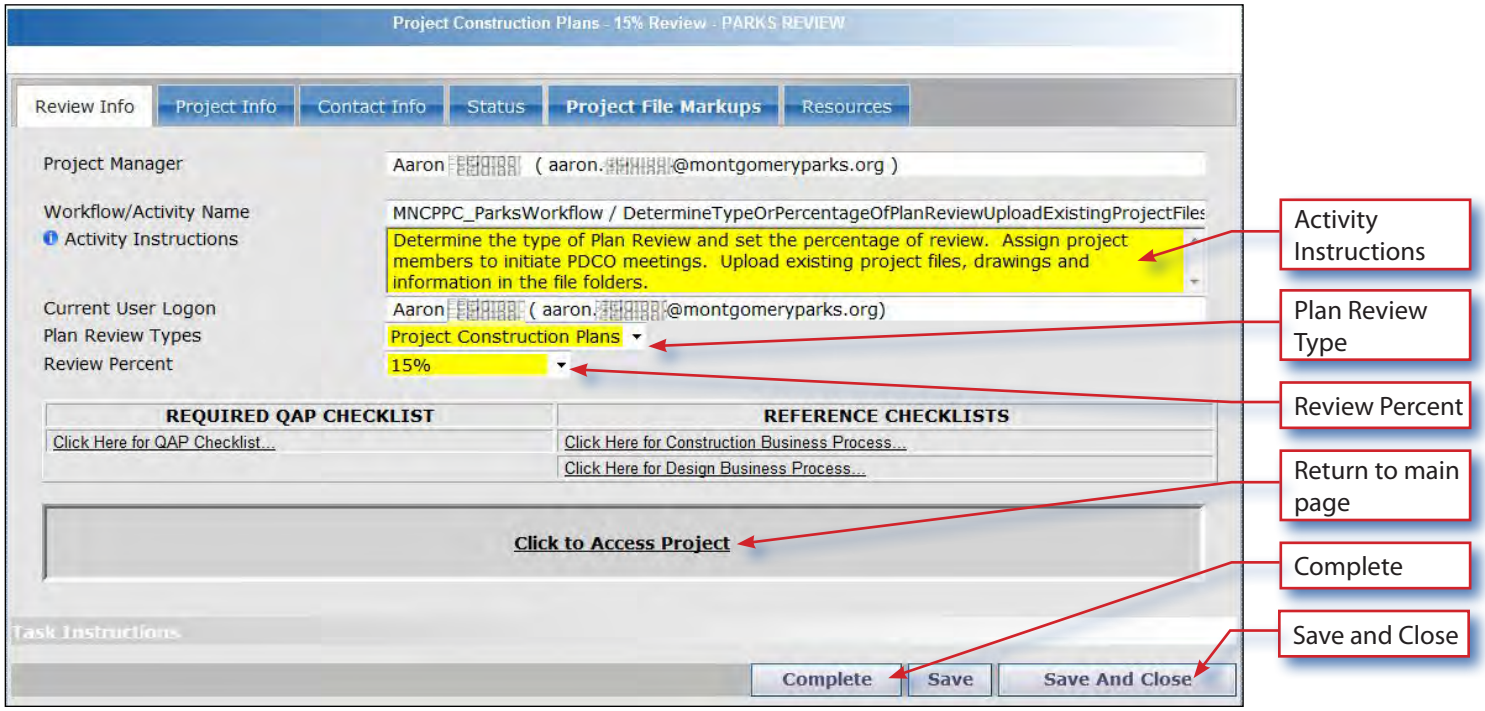


Task Name: Determine Type or Percentage of Plan Review, Upload Existing Project Files and Information.

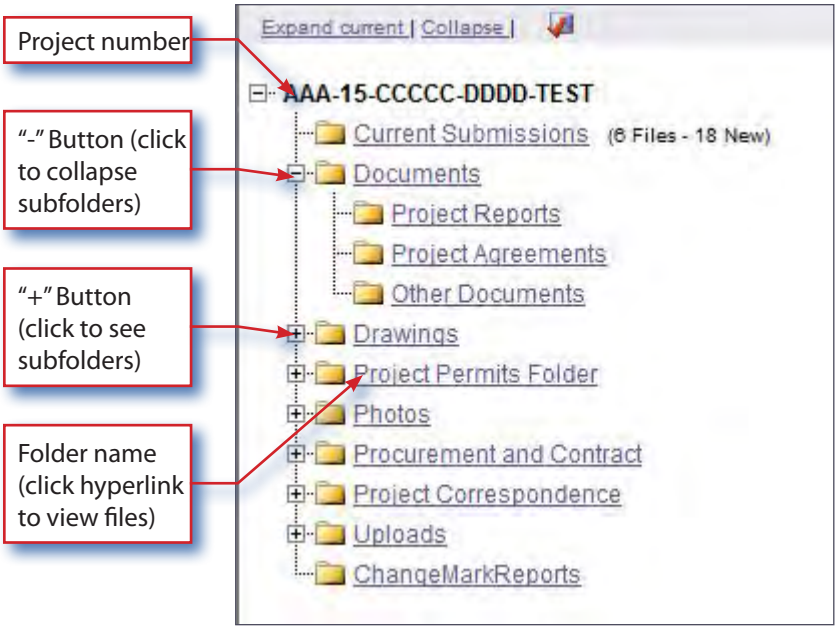
Now that you have set up your project template and added users, you are ready to begin the Workflow. The first task is to identify what type of project you are working on and to upload background documentation to the project folders.

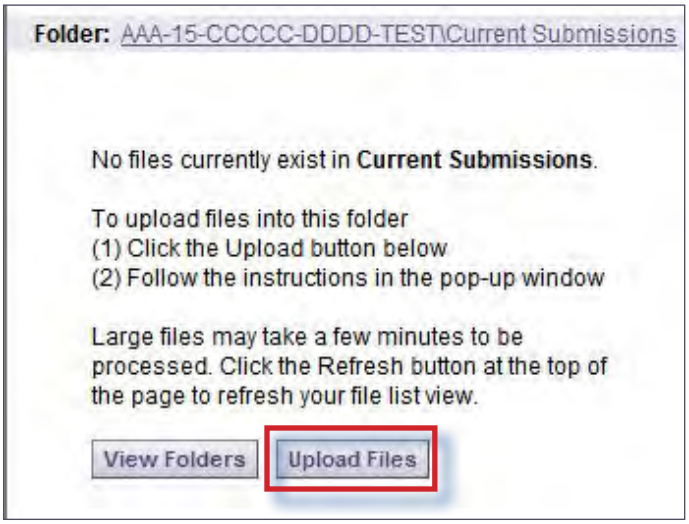


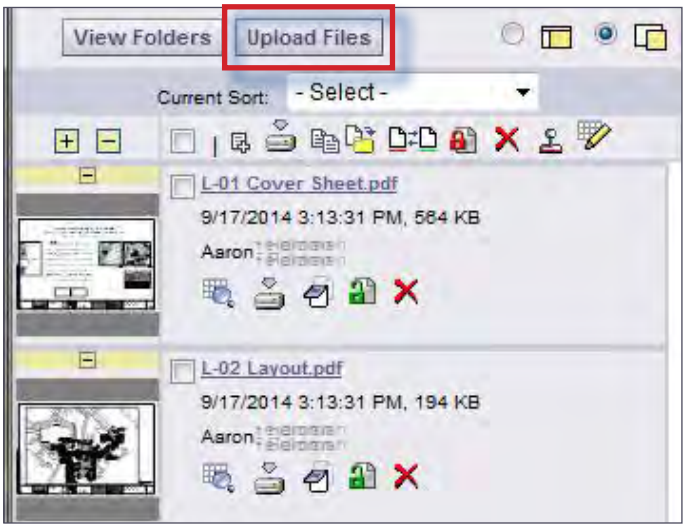
1. Once you start the Workflow, a task will appear in your Tasks List. Click the link entitled "DetermineTypeOrPercentageofPlanReviewUploadExistingProjecFilesandInformation."
2. A message will pop up asking if you want to accept the task. Click "OK"  to accept the task and open the eForm. *This step will take a few moments while ePlans generates the eForm for the first time on this project.*
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.



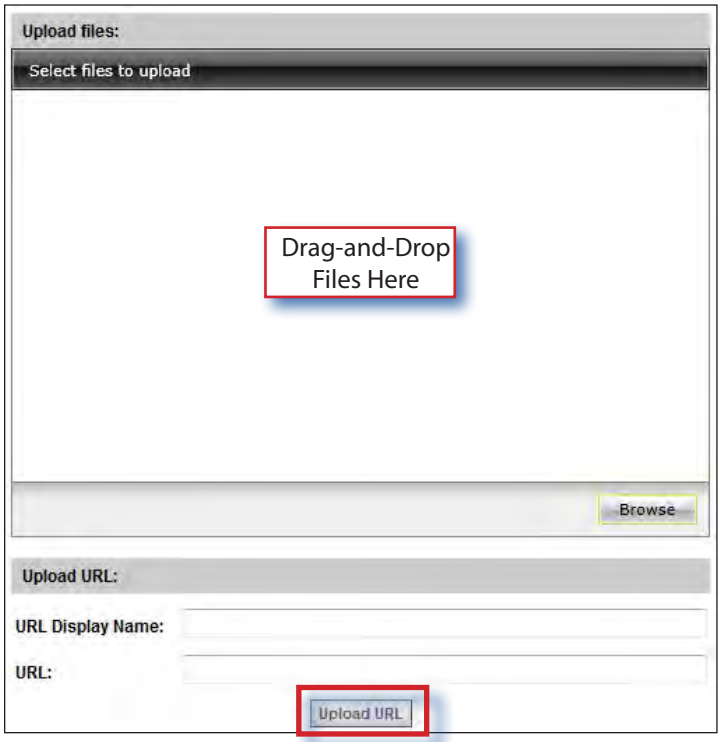
4. Select the appropriate Plan Review Type from the dropdown menu. A list of standard project types have been provided in the dropdown menu, or you can add your own by selecting "Other" and typing a new project type in the field provided.
5. To upload project files, navigate back to the project's main page by clicking the link entitled "Click to Access Project." You will see the project's file list on the left hand side of the project's main page. *See the File Management section of the Other Functions tab for instructions on modifying a project's file organization.*
6. Click the name of the folder to which you would like to upload files.
7. Click the Upload Files [Upload Files] button and a new window will appear allowing you to upload files. *If the destination folder is empty, you a set of instructions for uploading files will appear where the project's file list was. If there are already files in the folder the "Upload Files" button will appear at the top of the file list.*




Folder: AAA-15-CCCCC-DDDD-TEST\Current Submissions
No files currently exist in Current Submissions.
To upload files into this folder
(1) Click the Upload button below
(2) Follow the instructions in the pop-up window
Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your file list view.
View Folders
Upload Files

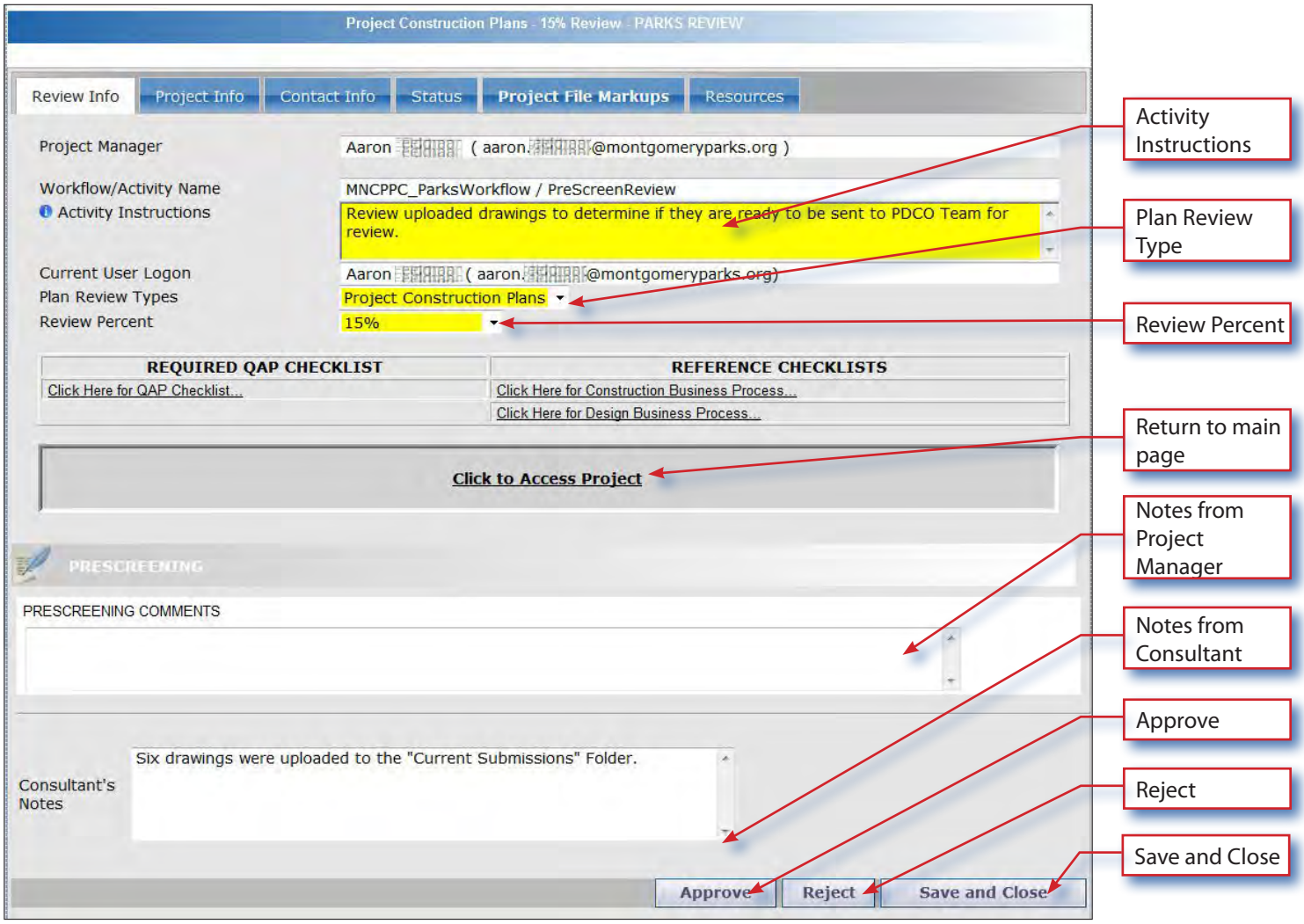


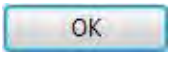
8. Click the Browse button, and a Windows Explorer window will open. *You can also open Windows Explorer on your own and drag-and-drop files directly.*
9. Navigate to the files you want to upload from your computer or local server file to ePlans. Highlight the desired files and click the Open button. *Hold down the "Control" key to select multiple files.*
10. Click the Upload button to upload the files. Repeat steps 6 through 10 until you have uploaded all of the necessary project files. *You can follow these steps to upload project files at any time.*
11. Once you are finished uploading files, return to the eForm. *If you closed the eForm, you can get back to it by clicking on the task in the Tasks List (see step 1).*
12. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure you want to complete this task. If so, click the OK button. *If you want to leave ePlans and finish this task later, click Save and Close* .
13. You are now finished with this task, and the Consultant will receive a notification to upload their drawings to ePlans for review.



Task Name: Pre-Screen Review

Once the Consultant uploads their progress drawings to ePlans, you will need to conduct a Pre-Screen Review to ensure the submission is acceptable to send to the PDCO team for their review.



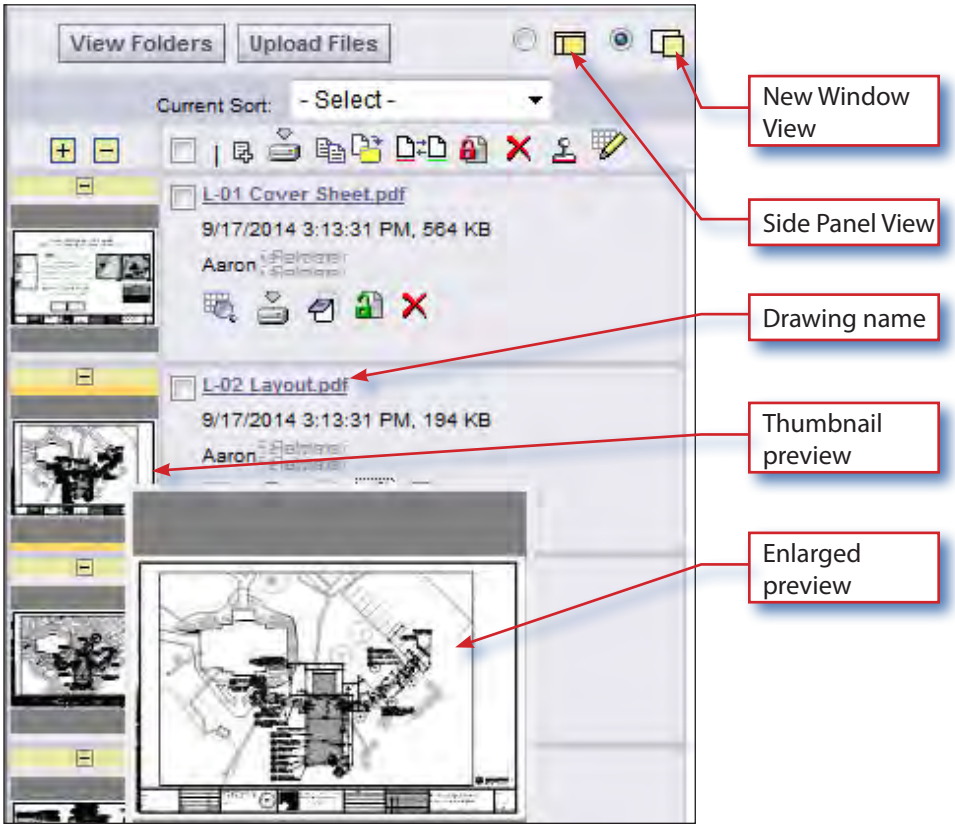
1. As soon as the Consultant completes the "Upload Project Drawings" task, a new task will appear in your Tasks List.
2. A message will pop up asking if you want to accept the task. Click OK  to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. Near the bottom of the page is a field labeled "Consultant's Notes." This is where you will find any special instructions left by the Consultant when they uploaded their drawings.
4. To view the uploaded drawings, click on the "Click to Access Project" link. This will take you back to the project's main page.

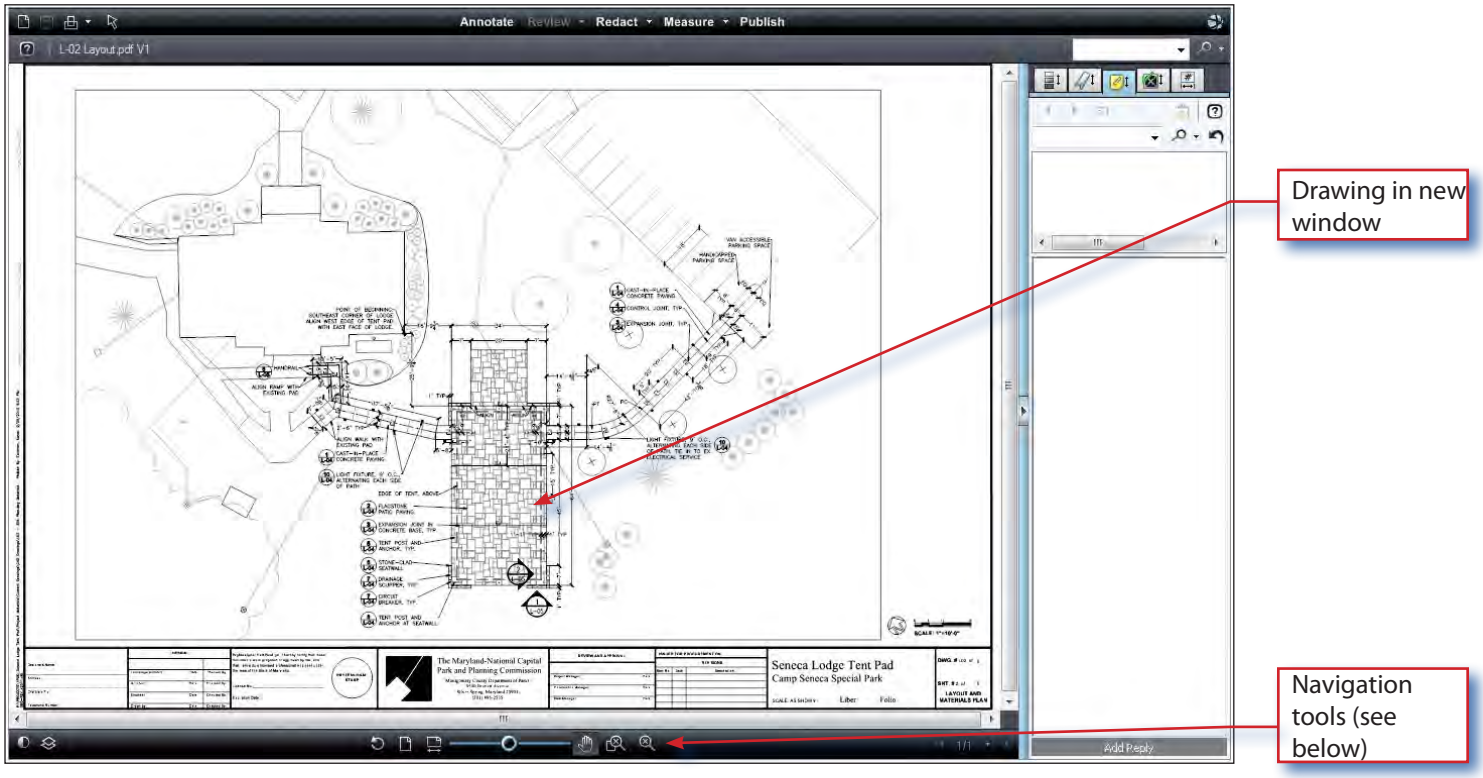
5. The project's file list will appear on the left side of the screen. Unless otherwise noted in the Consultant's Notes field, the files should be in the "Current Submissions" folder. Click the folder's name to see a thumbnail preview of all the drawings. Hover your cursor over one of the thumbnails to see a slightly enlarged preview. The File Management section under the Other Functions tab contains additional details about the different functions available in the file list.
6. You can modify the order in which the files appear by clicking the Edit

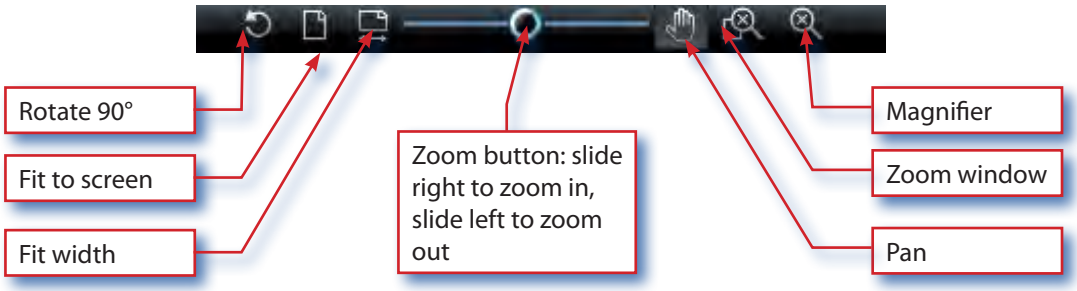
button on the project's main page and going to the Folders tab. Further instructions are in the Folder Management section of the Other Functions tab of this manual. *To allow for a more logical review process, it may be helpful to put the drawings in the same order they will appear in the final bid set.*
6. Before viewing the Consultant's drawings, set your view preference by clicking the radio button for the view you would like to use:

   Side Panel View - The drawings will appear in the same window as the file list, in the place of the Project Info panel. This setting reduces the number of windows you have open, making desktop navigation simpler.

   New Window View - Each drawing selected will open a new window. This setting allows for a larger viewing area for each drawing, but requires you to shuffle through multiple windows.
7. To view a drawing, click the drawing's name or its thumbnail image. This will launch the Brava Viewer. Use the toolbar at the bottom of the viewer to navigate around the drawing. To view another drawing, click on another drawing's name or thumbnail image.







8. At this point, you can use the Changemarks tool to make individual comments on each drawing. Refer to the PDCO Team Review task for detailed instructions on making Changemarks.

9. Once you have completed your review of all the drawings, return to the eForm to complete the task. Select one of the three buttons at the bottom of the eForm:

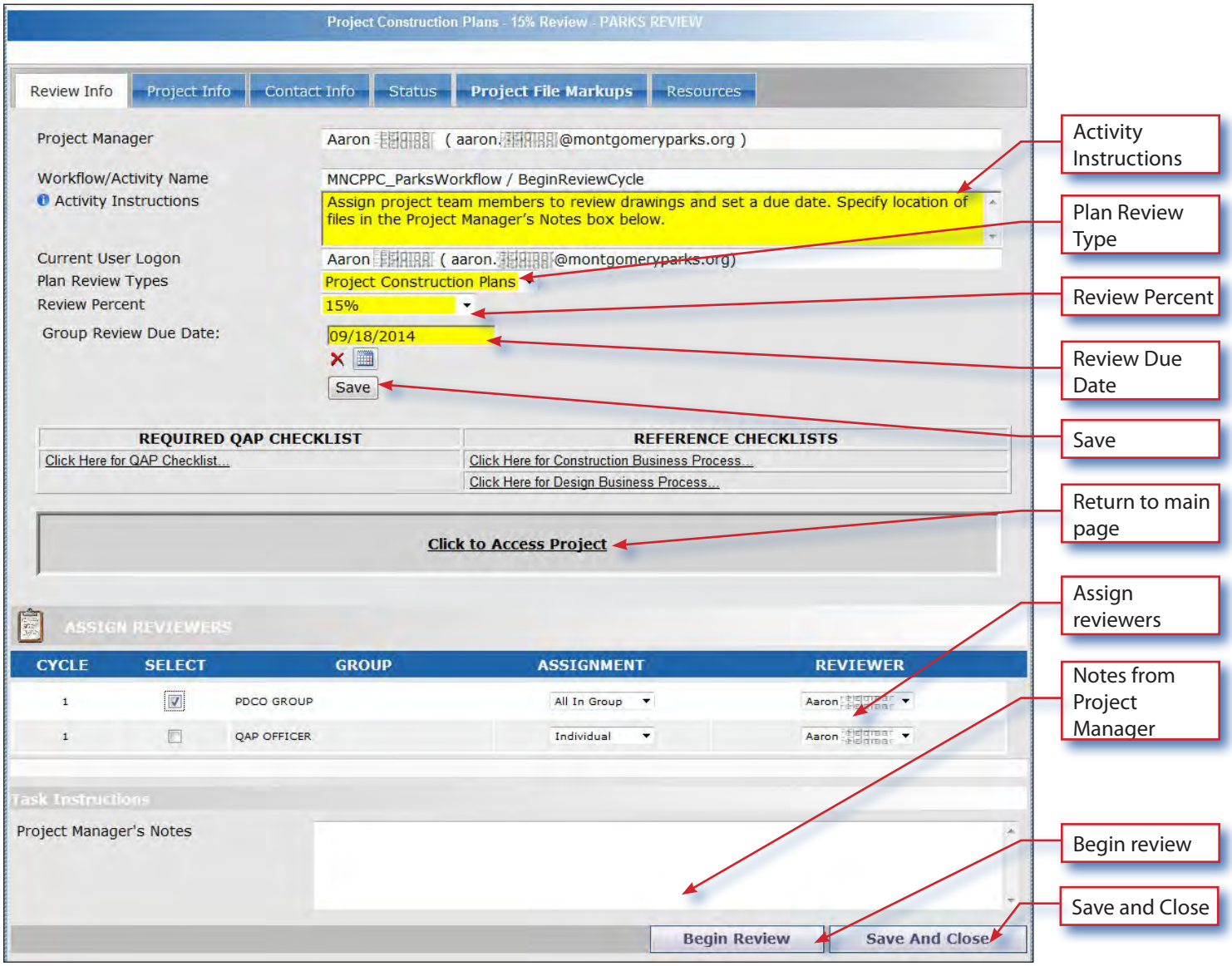
   Approve - Approve The drawings are acceptable to send to the PDCO Team for their review without any changes from the Consultant. This option will skip the "Upload Revised Drawings" task and move the workflow directly to the "Begin Review Cycle" task.

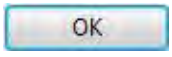
   Reject - Reject The Consultant needs to make changes to the drawing before they can be sent to the PDCO Team. Enter your instructions to the Consultant in the Prescreening Comments field on the eForm and click the Reject button. This will launch the "Upload Revised Drawing" task for the Consultant and you will need to complete another Pre-Screen Review before sending the drawings to the PDCO Team.

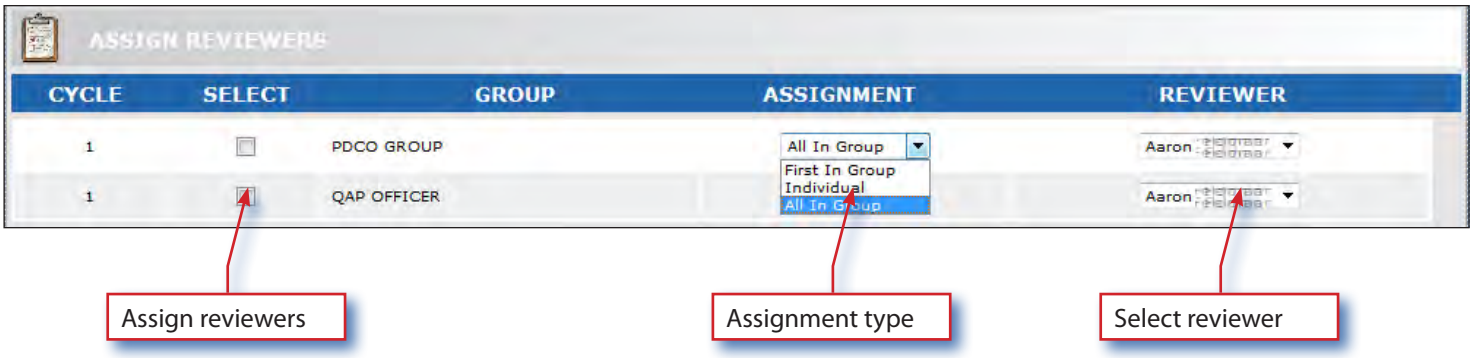
   Save and Close - Save and Close Select this button if you want to leave ePlans and finish the task later.

Task Name: Begin Review Cycle

Once you are satisfied with the Consultant's drawings, you will need to assign reviewers and set a due date for them to complete the review.



1. A new task will appear in your Tasks List. Click on the link entitled "BeginReviewCycle."
2. A message will pop up asking if you want to accept the task. Click "OK"  to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. Select the Group Review Due Date and click the Save button. This is the deadline for all PDCO Team members to complete their review of the submitted drawings.



5. Assign reviewers by clicking the checkbox next to each group you would like to include in the PDCO Team Review. *As Project Manager you are included in the PDCO Team Review by default, so don't worry about adding yourself to the reviewers list.*
6. If there are external stakeholders or permitting agencies who are part of your project team, they can be part of the PDCO Review Cycle. You can do this by adding external reviewers to the "External" or "Other" user groups (see the instructions for adding users to a project in the Project Startup section of the Project Manager tab) and following the instructions in step 5 above. *Alternately, you can obtain their comments outside of the ePlans Workflow. Because external reviews often take longer than PDCO Team reviews, coordinating external reviews outside of the ePlans Workflow will allow you to return PDCO Team comments to the Consultant in a more timely fashion.*
7. Set the Assignment type for each review group.

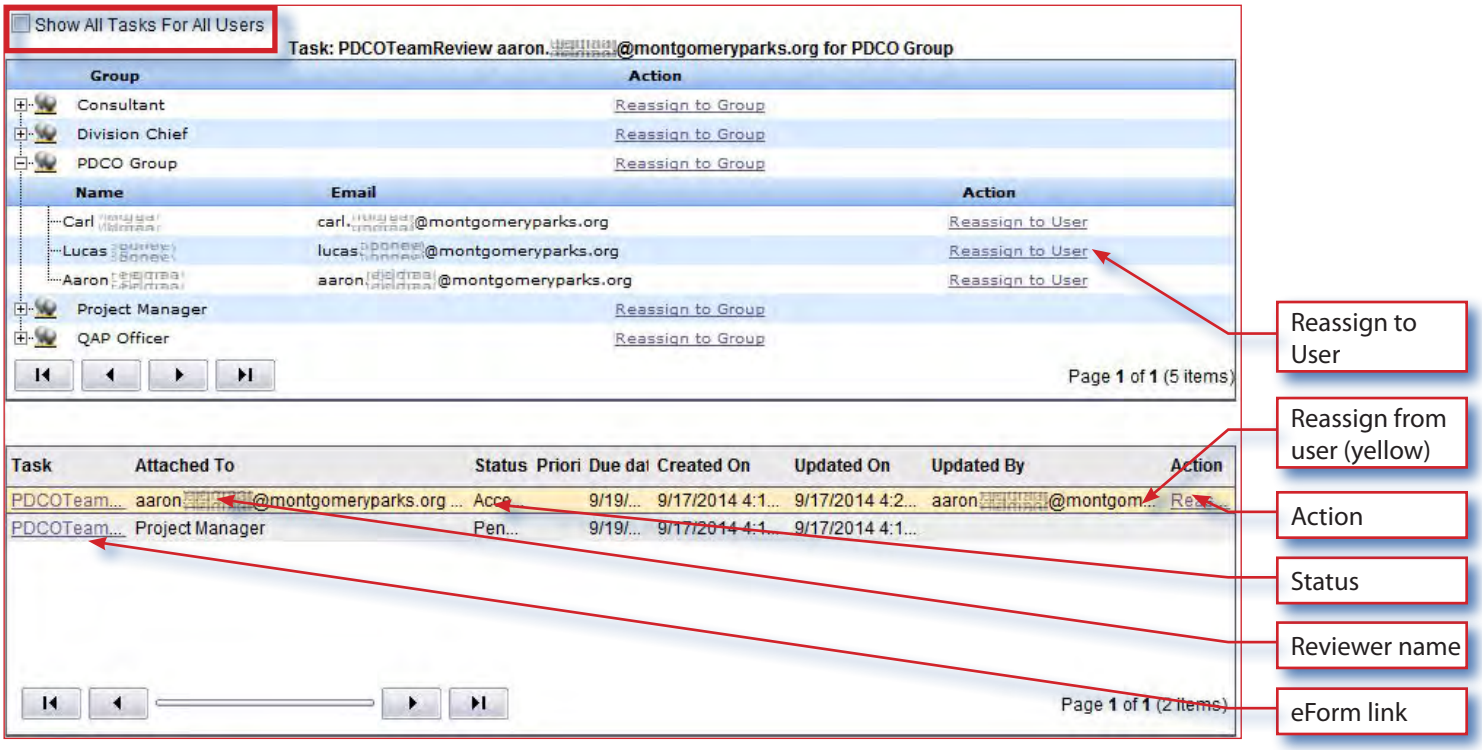
   First in Group - All users in the group will receive the task, but once the first person receives the task, it disappears from everyone else's Tasks List.

   All in Group - All users in each group selected will receive this task and all users must accept the task. This is the default setting for this Workflow and the most common setting to use in the park development review process.

   Individual - The task is assigned to the individual user whose name is selected in the dropdown list to the right of the assignment type.
8. The Project Manager's Notes field at the bottom of the eForm allows you to communicate general instructions about the submission to the PDCO Team. Enter any applicable notes there.
9. Click the Begin Review button at the bottom of the eForm to finish this task and move on.

Task Name: PDCO Team Review (Reassign and Skip Pending Tasks)

As the Project Manager, you are responsible for completing a review of the Consultant's documents just like every other member of the PDCO Team. See the PDCO Team Workflow tab for detailed instructions on how to make and submit comments. In addition to conducting a PDCO Team review of your own, you are responsible for monitoring the progress of the PDCO Team and ensuring everyone submits their comments by the assigned due date. In order to keep a project moving, you can bypass a reviewer's task or reassign a reviewer's responsibilities to another user.



1. Click the "Show All Tasks For All Users" checkbox to see the status of each member of a review. The Status column will show one of three words:

   Pending - The task has not yet been accepted by the assigned user.

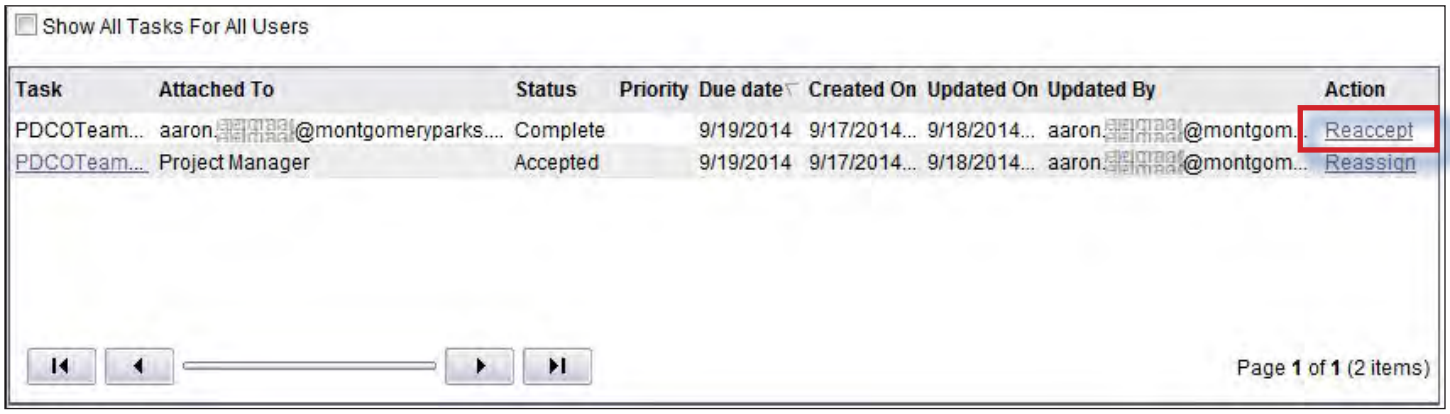
   Accepted - The assigned user has accepted the task but not yet completed it.

   Complete - The user has completed the assigned task.

2. To reassign a review task to another user, click the "Reassign" link in the Action column. A pop-up window will appear asking if you want to reassign this task to another user. Click the OK button to go to the Reassign window.

3. The user currently assigned to the task will be highlighted in yellow at the bottom of the screen. Select a user within the PDCO Team from the list at the top of the screen and click the "Reassign to User" link. *If you want to reassign to someone outside of the PDCO Team, you will need to use the Edit button in the main toolbar to add that user to the PDCO group. You can also reassign a task to yourself, which will allow you to complete a task without the original reviewer's comments.*

4. If a PDCO Team member accidentally completes their task and wants to enter additional comments, you can re-open their review by clicking the "Reaccept" link under the Action column of the task list. The task will then re-appear in that PDCO Team member's task list.

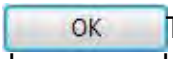


5. You can end a PDCO Team Review early by clicking the Skip Pending Tasks

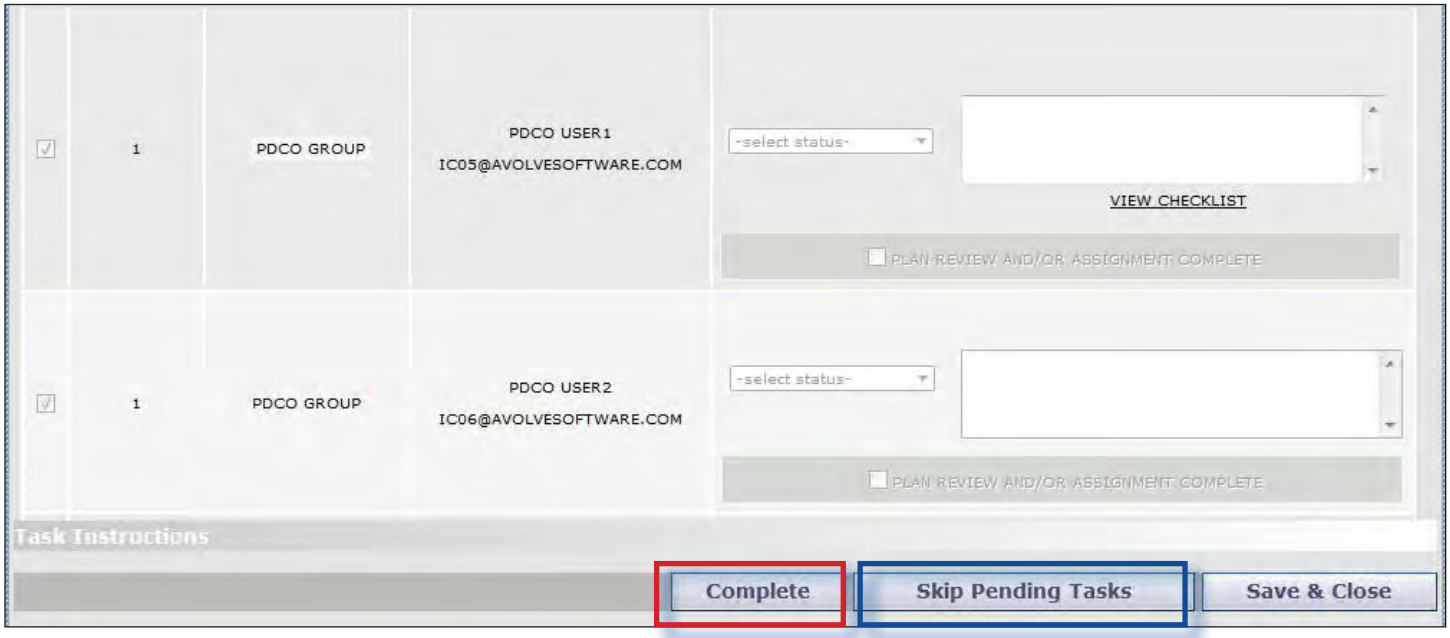
button on the bottom of the eForm. You will be asked to make sure that you want to skip all pending tasks. If so, click the OK

button.

6. Click the Complete

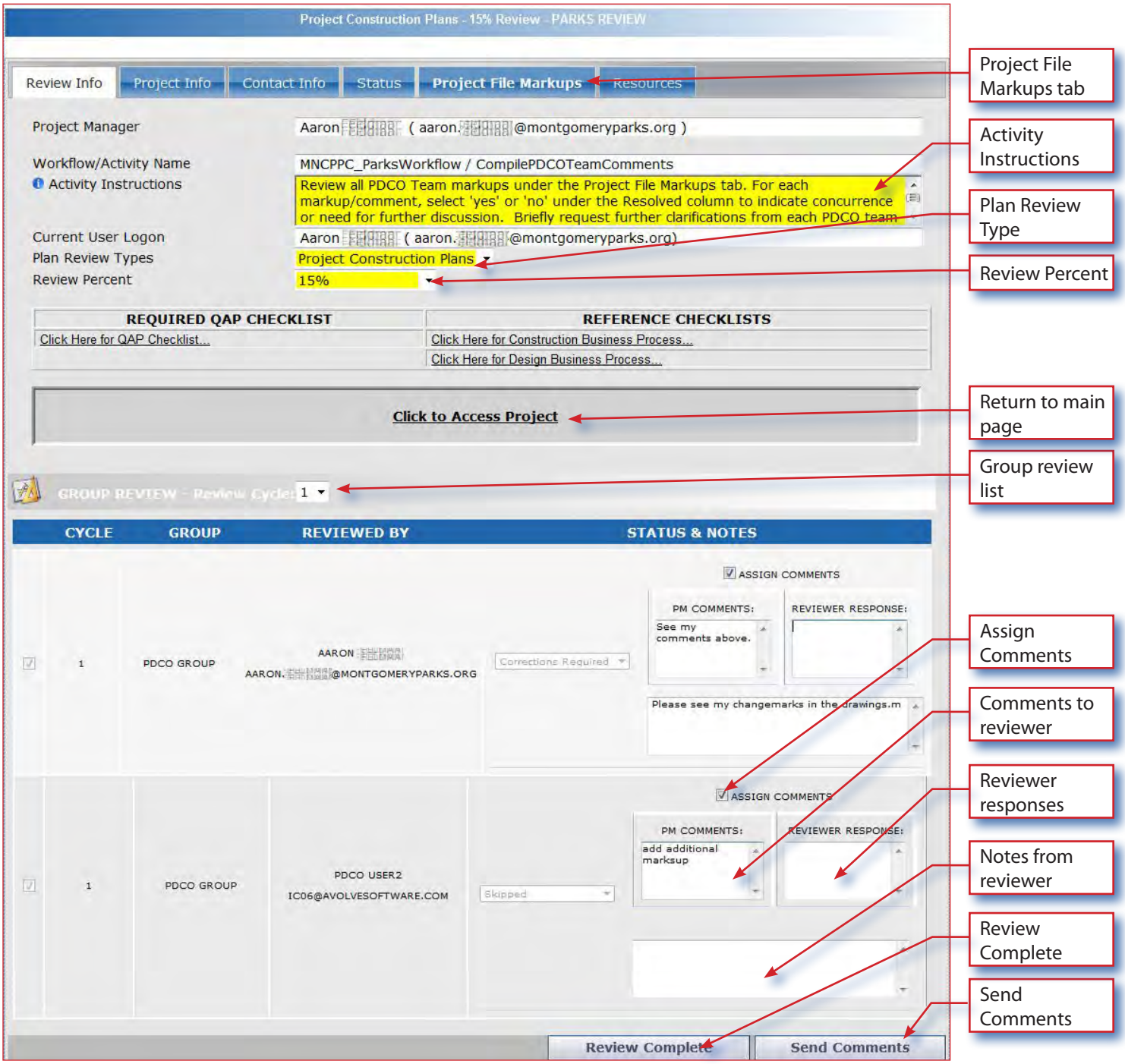
button at the bottom of the eForm to finish the PDCO Team Review task. You will be asked to make sure that you want to complete the PDCO Team Review. If so, Click OK. 

The status of all PDCO Team members will change to "Complete" for this task and it will be removed from their Tasks List. *Once you click the "Complete" button, you cannot review the PDCO Team Review Task within the eForm. PDCO Team members are still able to make Changemarks on the drawings, but they will not be visible on the eForm.*

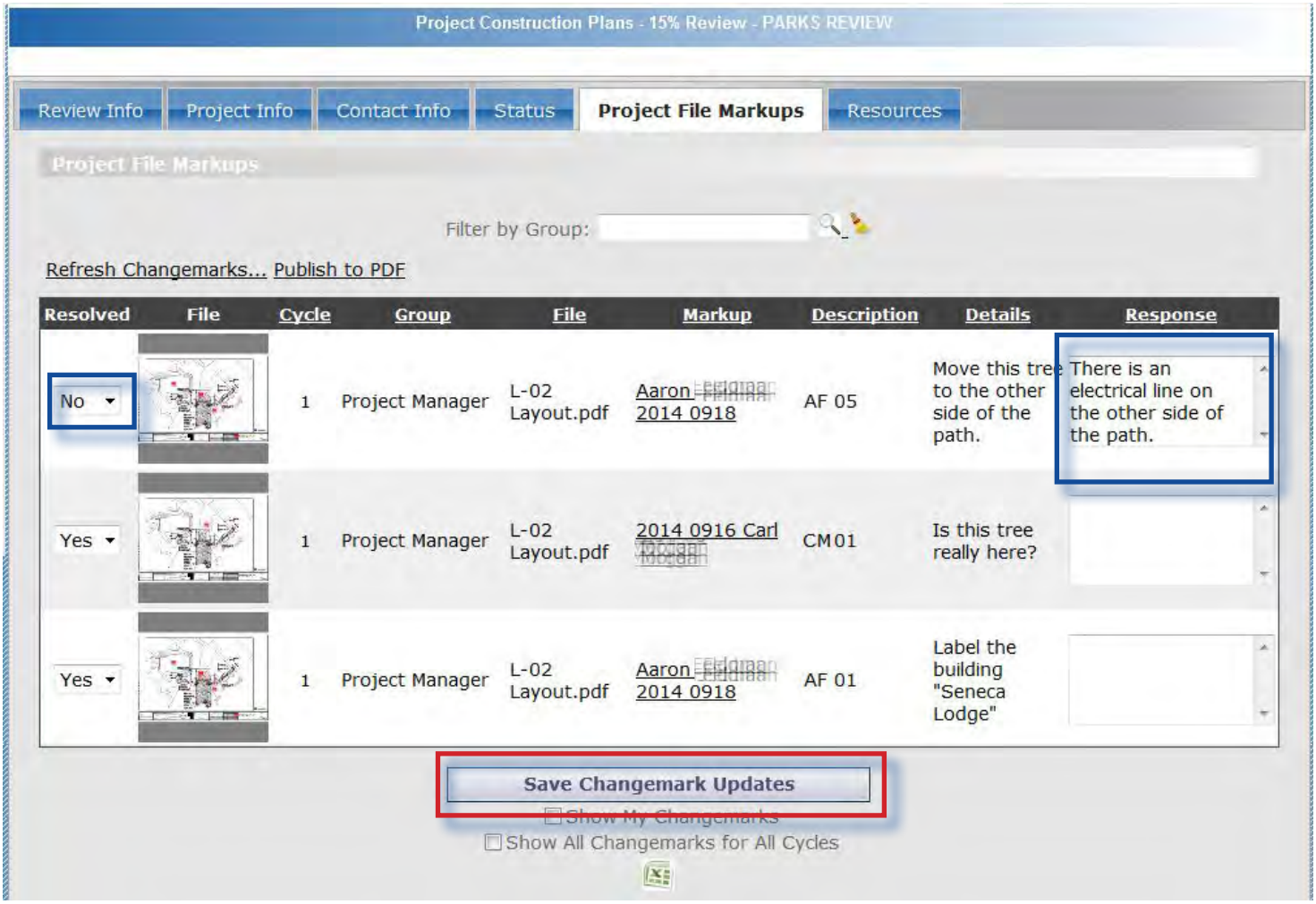


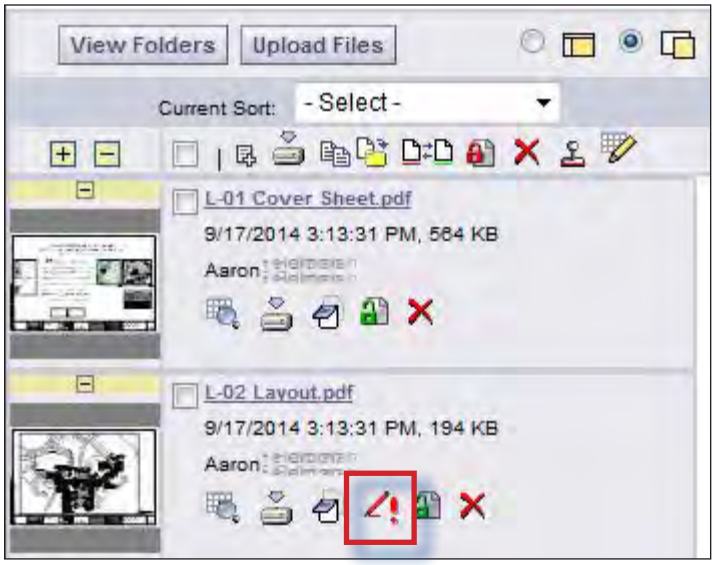
Task Name: Compile PDCO Team Comments

Once every member of the PDCO Team has had the opportunity to comment on the Consultant's documents, you will need to compile and review the comments before sending them to the Consultant. This task allows you to rectify any conflicting comments, remove any redundancies and clarify discrepancies with individual reviewers.



1. A new task will appear in your Tasks List. Click on the link entitled "CompilePDCOTeamComments."
2. A message will pop up asking if you want to accept the task. Click OK [OK] to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of yhe Workflow.
4. Click the Project File Markups tab at the top of the screen to see a list of every Changemark made on the drawing set. *You can view all of a project's markups outside of the Workflow by generating a Project Markups Listing from the Reports tab. Instructions for generating reports can be found in the Reporting section of the Other Functions tab.*
5. Review each of the Changemarks. For each Changemark that you feel is appropriate to forward on to the Consultant, select "Yes" from the dropdown menu in the "Resolved" column. If you want a reviewer to modify or clarify one of their Changemarks, select "No" from the dropdown menu and enter your comments in the Response field for that Changemark.
6. Once you have reviewed all of the Changemarks for this review, click the "Save Changemark Updates" [Save Changemark Updates] button.





7. You can view and edit Changemarks within the context of an individual drawing by navigating back to the file list on the project's main page and selecting the folder to which the Consultant's drawings are saved (this is usually the Current Submissions folder). *Do not close the eForm while you are viewing Changemarks, it may be helpful to toggle back and forth between the two screens.*

8. If Changemarks exist within a drawing, the Markups icon will appear below the file name. Click the Markups icon and the View Markups screen will appear.

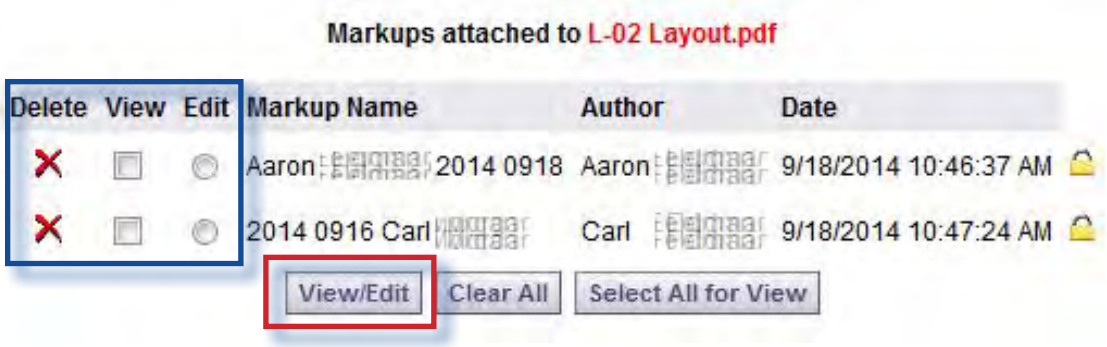
9. Decide which Changemarks you want to view or edit.

   View - To view Changemarks, click the "View" checkbox for each markup name you would like to see. You can view as many or as few Changemarks at the same time as you like.

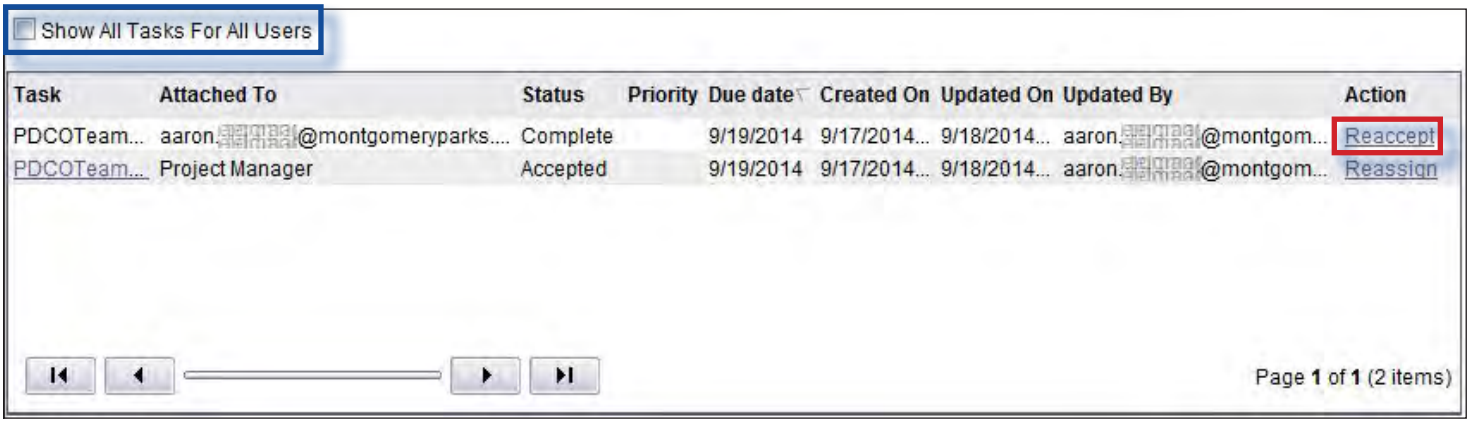
   Edit - To edit Changemarks, click the "Edit" radio button for the Changemark you want to edit. You can only edit one set of Changemarks at a time.

   Delete - You also have the capability to delete an entire set of Changemarks. *Do not use this feature until you have consulted with the author of those Changemarks.*

10. Once you select the markup you want to view or edit, click the View/Edit button. The drawing and all the selected markups will appear in the Brava Viewer. Here you can use the tool bar at the bottom of the screen to navigate to different areas of the drawing. *You can also click individual Changemarks to see the text of each.*

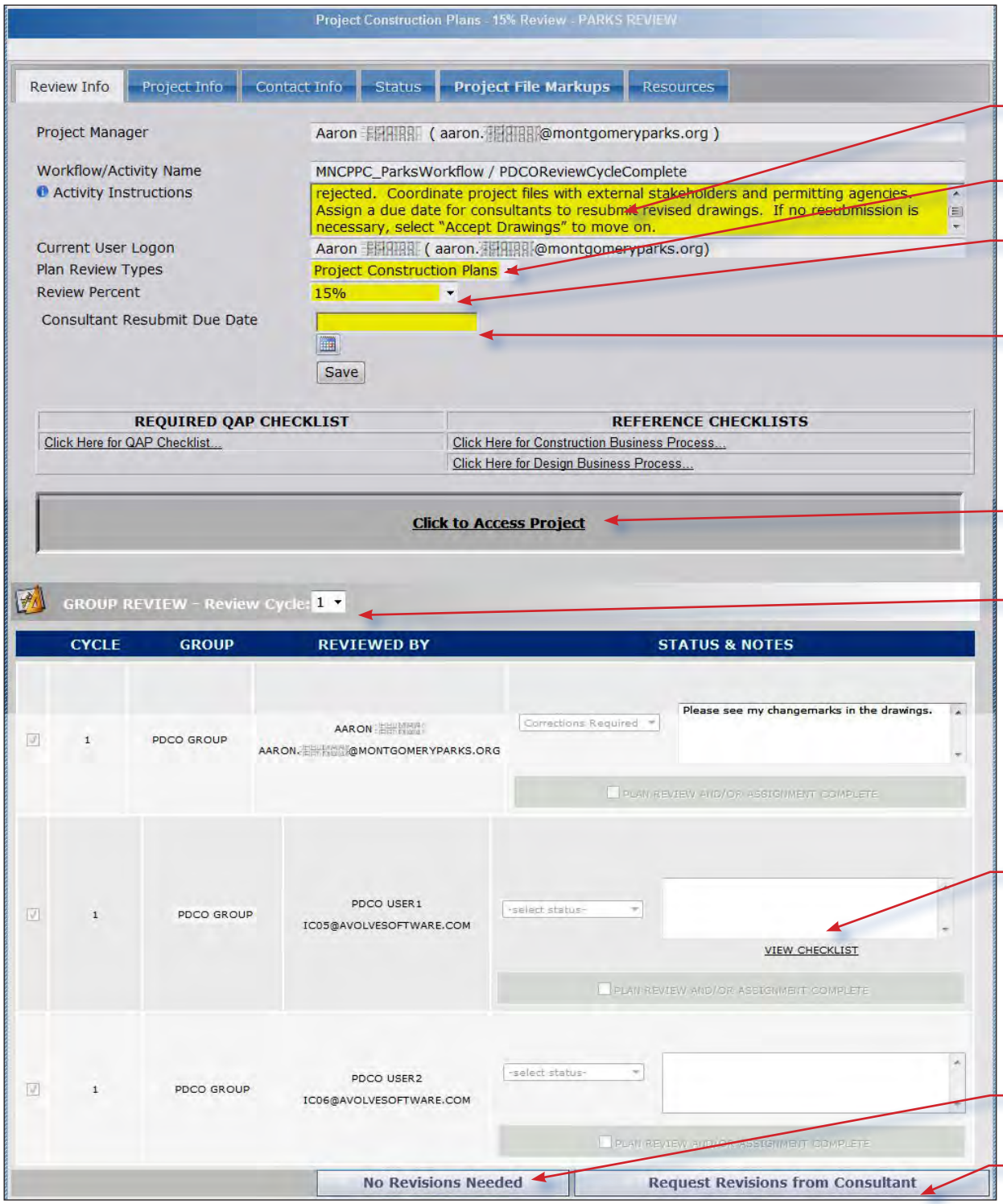


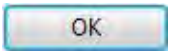
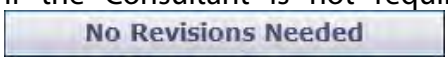
11. After reviewing all Changemarks for this review cycle, return to the eForm and scroll to the bottom of the screen to the Group Review list.
12. Select the "Assign Comments" checkbox for each reviewer who has unresolved Changemarks (Changemarks marked "No" in the top of the Project File Markups tab.
13. Type any general comments, questions or instructions in the PM Comments field for each reviewer. The PM Comments Field and Reviewer Response field show a record of all the text entered into these boxes. *To better organize your comments and responses, enter your most recent set of comments at the top of the box each time, adding a date in front of each comment.*
14. Click the Send Comments button to notify PDCO Team reviewers of unresolved comments.
15. Repeat steps 1 through 14 until all Changemarks are resolved. *As Changemarks are resolved, change their status from "No" to "Yes" to easily track which comments still need to be resolved.*
16. Once all of a reviewer's Changemarks are resolved, uncheck the "Assign Comments" checkbox for that reviewer.
17. Once you are satisfied with all of the Changemarks, make sure all of the "Assign Comments" checkboxes are unchecked and click the Review Complete button to end this PDCO Team review.
18. If a member of the PDCO team has additional comments after they have already completed their review, you can re-open their task. Navigate to the project's task list and click the "Show All Tasks for All Users" checkbox. Find the PDCO team member's name and click the "Reaccept" link in the far-right column of the list. The task should reappear in the PDCO team member's task list.



Task Name: PDCO Review Cycle Complete

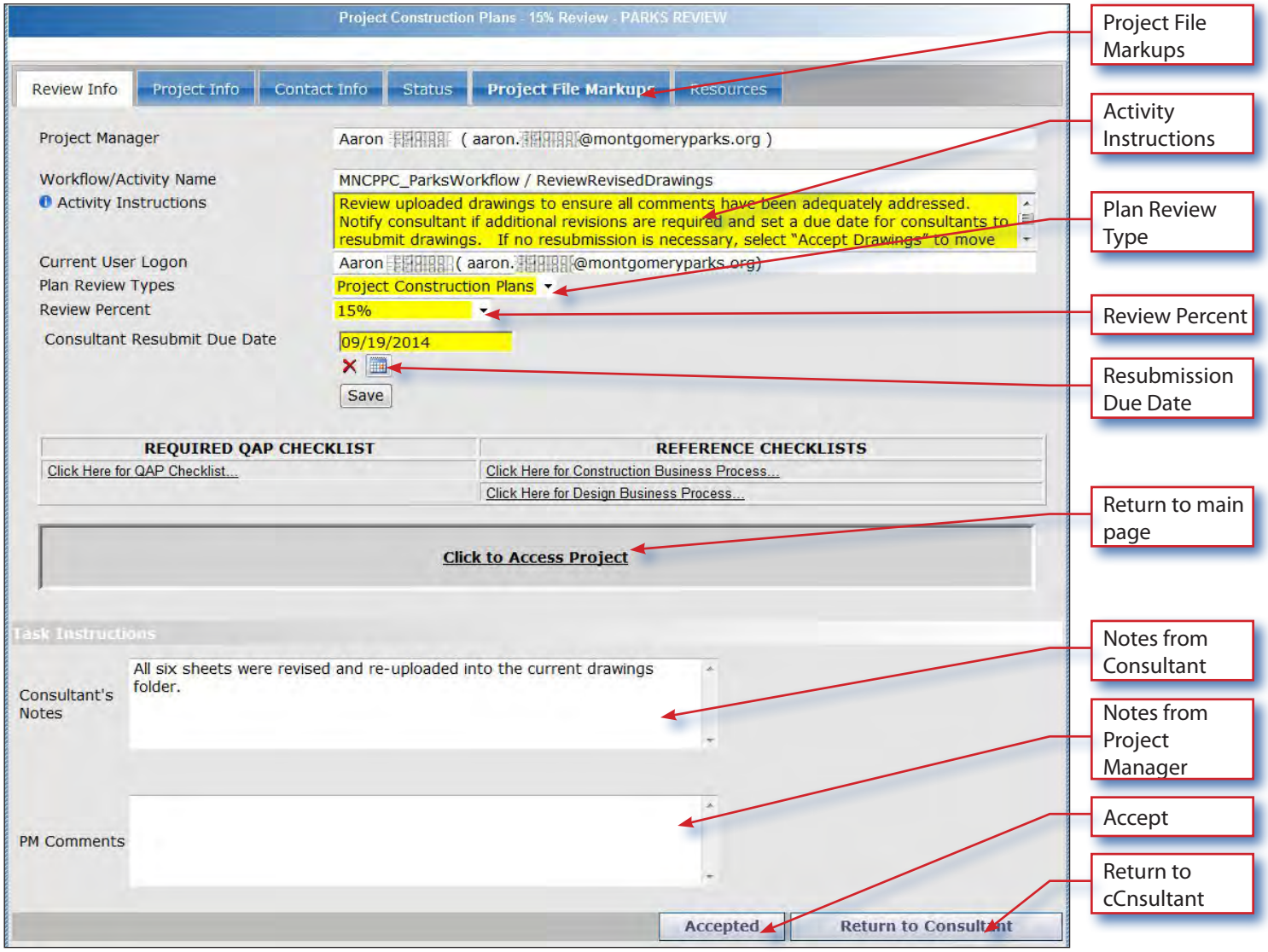
Once you have coordinated all of the PDCO Team comments and comments from external reviewers, you are ready to send all of the comments to the Consultant for their action.

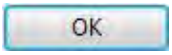


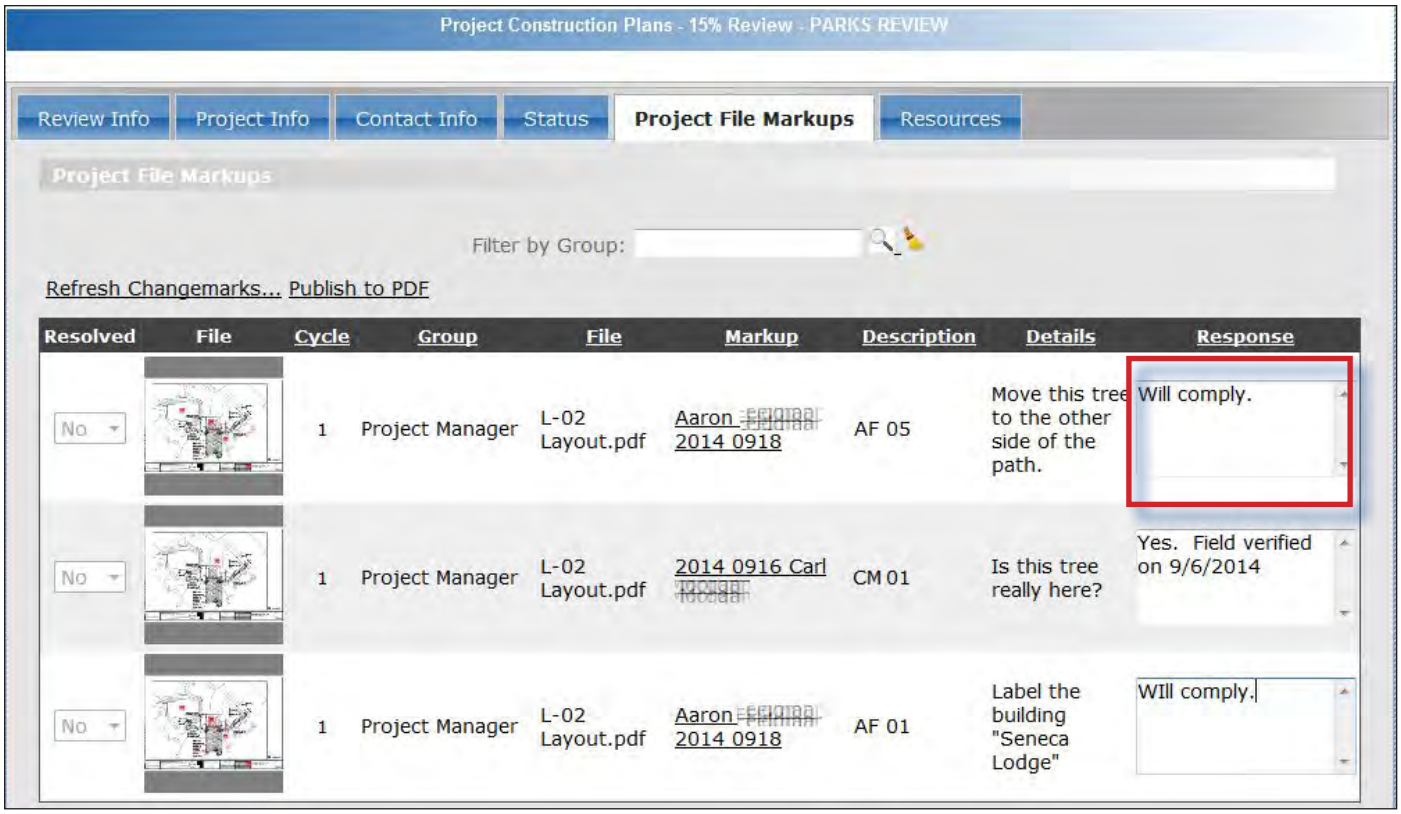
1. A new task will appear in your Task List. Click on the link entitled "PDCOReviewCycleComplete."
2. A message will pop up asking if you want to accept the task. Click OK  to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. If the Consultant is required to make revisions based on PDCO Team comments, select the Consultant Resubmit Due Date and click the Save button. This is the deadline for the Consultant to submit their revised drawings.
5. Click the Request Revisions from Consultant button to notify the Consultant that there are comments waiting for them to address before moving on to the next review cycle. *Clicking this button allows the consultant the view the list of Changemarks in the Project File Markups tab.*
6. If the Consultant is not required to make any revisions, click the "No Revisions Needed"  button. *Clicking the "No Revisions Needed" button means the consultant will not be able to view any Changemarks under the Project File Markups tab of the eForm. The Consultant can still view markups on the project file list of the project's main page.*

Task Name: Review Revised Drawings

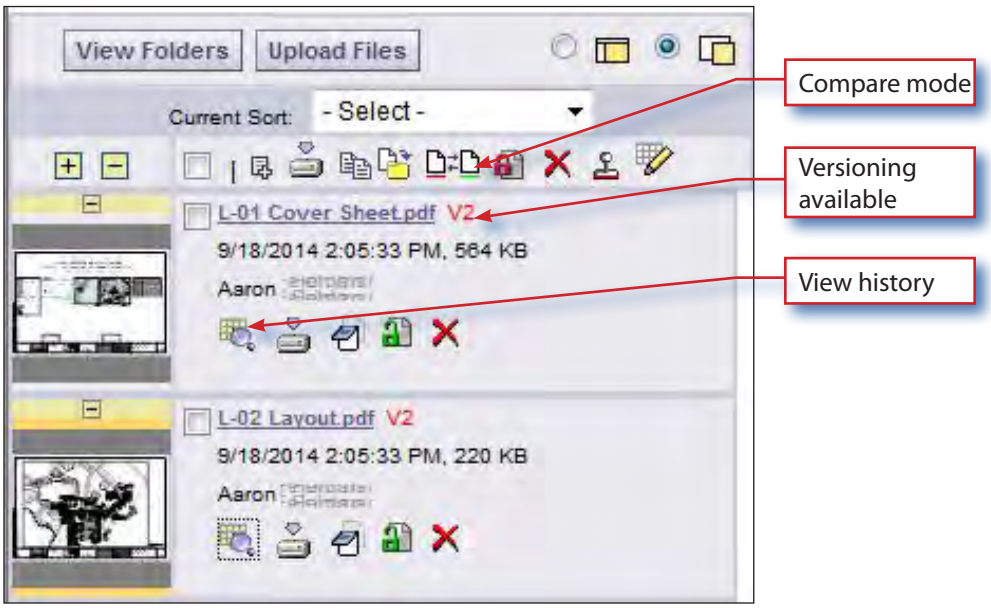
After the Consultant revises their drawings, you will need to conduct another review to make sure all of the PDCO Team and external reviewers' comments have been addressed. This task is similar to the Pre-Screen Review and can be repeated until the Consultant has satisfactorily addressed all of the comments provided to them.



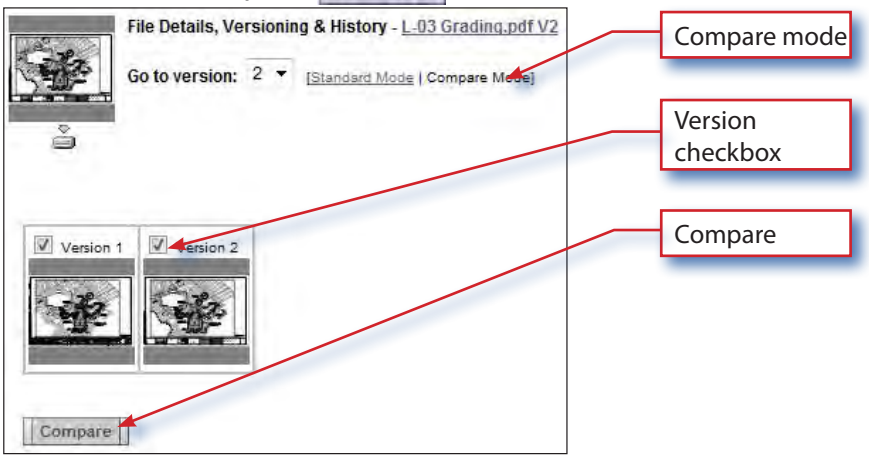
1. A new task will appear in your Tasks List. Click on the link entitled "ReviewRevisedDrawings."
2. A message will pop up asking if you want to accept the task. Click OK  to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. Near the bottom of the page is a field labeled "Consultant's Notes." This is where you will find any special instructions from the Consultant.



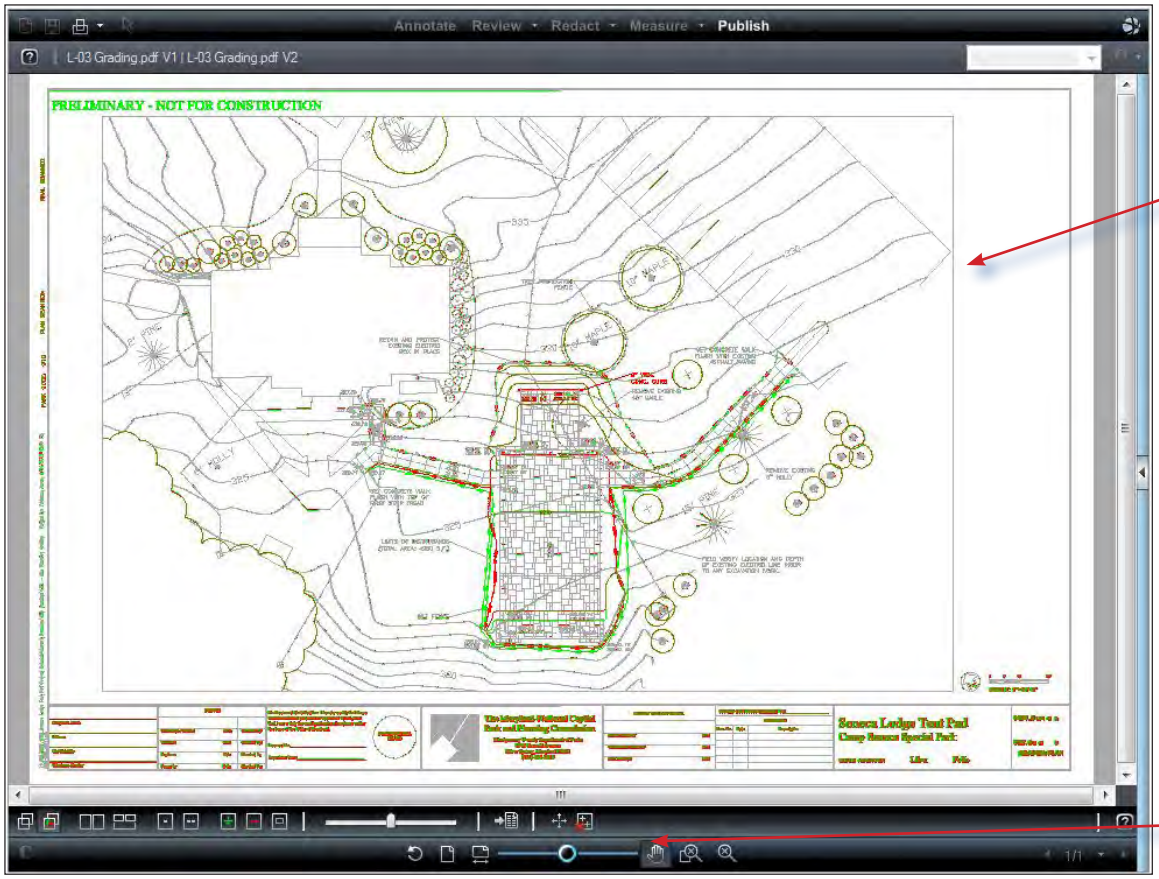
4. Click the Project File Markups tab at the top of the screen. The top portion of the Project File Markups tab shows a list of every Changemark made on the drawing. View the Consultant's response to each Changemark in the "Response" column at the right of the screen. *You can view all of a project's mark-ups outside of the Workflow by generating a Project Markups Listing from the Reports tab. Instructions for generating reports can be found in the Reporting section of the Other Functions tab.*



5. You can view and edit Changemarks within the context of an individual drawing by following the instructions in Step 7 of the "Compile PDCO Team Comments" task.
6. You can also compare the revised drawings with the original drawings by using the Versioning tool, available on any drawing that has a red "V2" (or V3, V4, etc.) next to its name. Click the View History icon beneath the file name you want to view, and the File Details, Versioning and History page will appear in a new window.
7. Click the "Compare Mode" link at the top of the screen.
8. Select the two versions of the file you want to compare by checking the checkbox next to the appropriate version number.
9. Click the "Compare" Compare button at the bottom of the screen to open the Brava Viewer.



10. You can also compare two drawings within the same folder by clicking the checkbox next to each drawing's name and clicking the Compare Checked Files icon at the top of the project's file list. This will bypass the File Details, Versioning and History page and open the Brava Viewer directly. *You can compare drawings in different folders or different projects by using the Global Compare tool. See instructions in the Other Functions tab.*
11. The Brava Viewer is configured to load two versions side-by-side as the default view, and the oldest version will always be on the left. You can also overlay the two files, viewing only elements that have been added (green), elements that have been deleted (red) and elements that remain unchanged between the two files. The toolbar at the bottom of the screen allows you to toggle between the different views.
12. Once you have determined whether or not the Consultant has addressed all the comments from the PDCO Team and external reviewers, return to the Review Info tab of the eForm. If the Consultant has not addressed all the comments, enter any additional instructions in the PM Comments field and click the Return to Consultant Return to Consultant button. Once the Consultant uploads their revised drawings, you will need to review the drawings again.
13. If all comments have been addressed, click the Accepted Accepted button to move on to the next task.



Overlay - Places the two versions on top of one another.

Overlay Differences - Shows elements that have been added to Version 2 (in green), deleted from Version 1 (in red) and remain unchanged (in grey).

Side-by-Side - Shows the two versions next to each other (default view).

Version 1 - Shows the older version only.

Version 2 - Shows the newer version only.

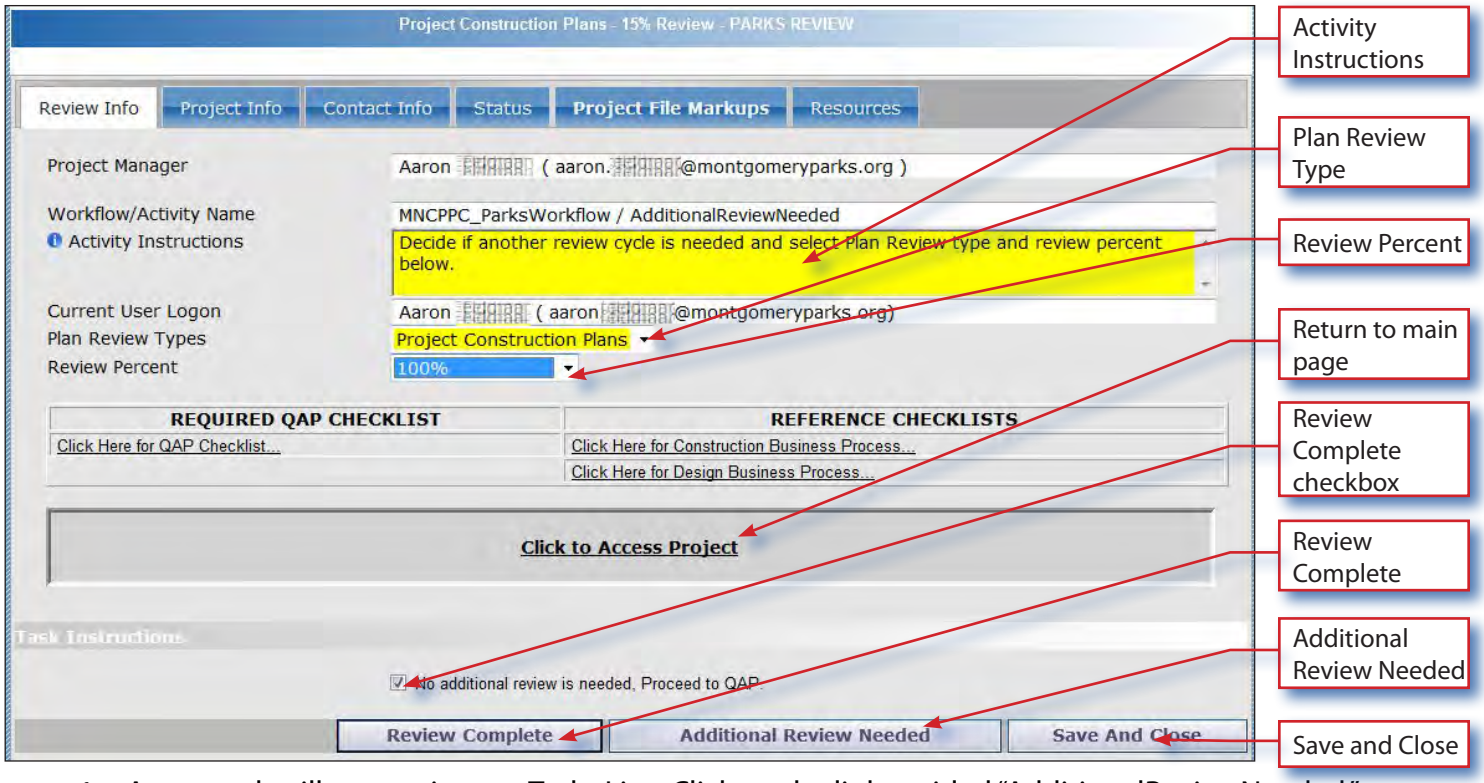
Additions - Shows only elements that have been added to Version 2 (in green).

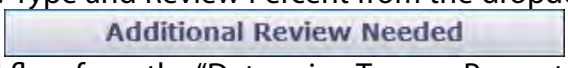
Deletions - Shows only elements that have been deleted from version 1 (in red).

Unchanged - Shows only elements that have not changed between versions (in grey).

Task Name: Additional Review Needed

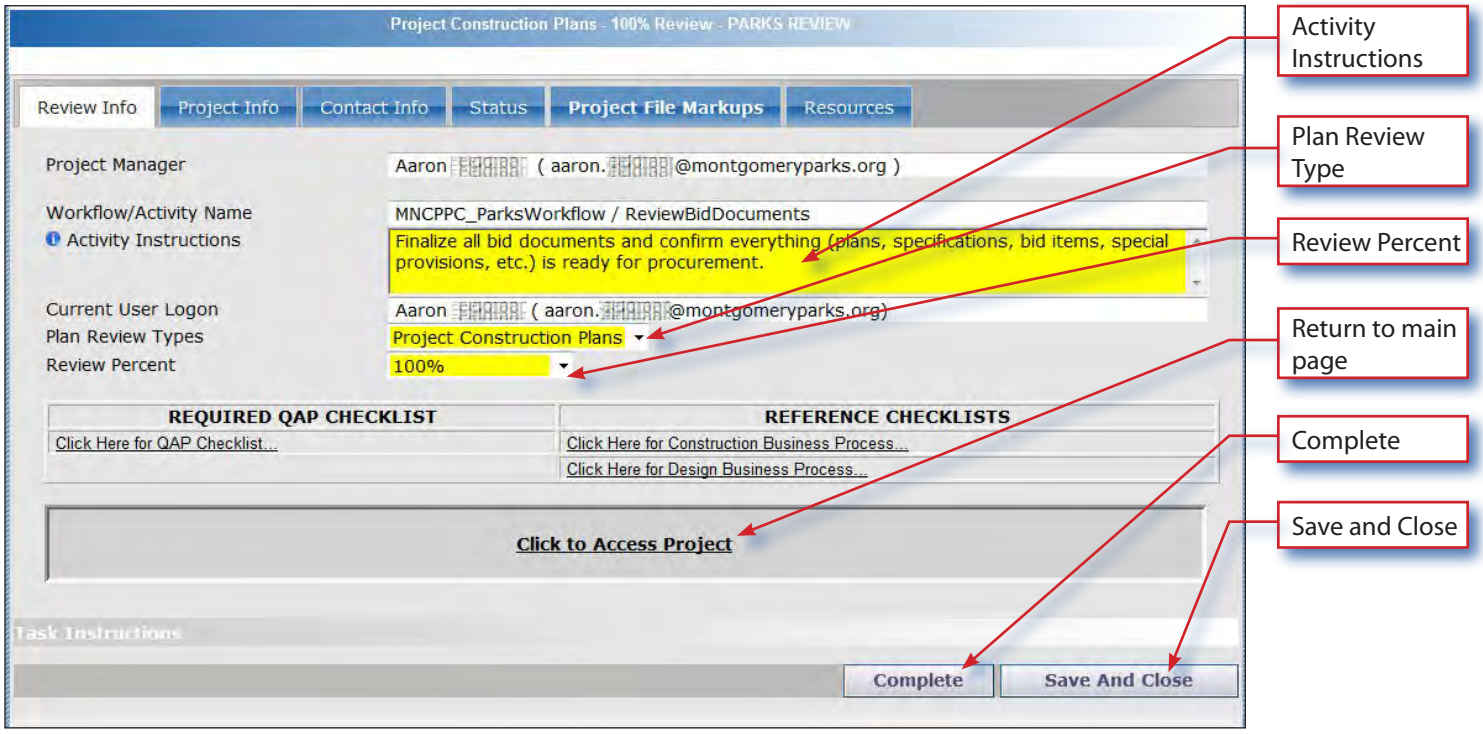
Once you have approved the drawings received from the Consultant, you are effectively finished with the current level of review and should save a record set of the drawings as they stand. If your project is still in development, you can begin another review cycle for the next milestone. If you just completed the 100% review, you are ready to move on to the Quality Assurance Program (QAP) process.



1. A new task will appear in your Tasks List. Click on the link entitled "AdditionalReviewNeeded."
2. A message will pop up asking if you want to accept the task. Click OK to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. If your project is still in development and you need to go through another review cycle, select the appropriate Plan Review Type and Review Percent from the dropdown menus and then click the Additional Review Needed  button at the bottom of the page. This will restart the Workflow from the "Determine Type or Percentage of Plan Review" task. *All of the Changemarks, plans, comments and reports from the previous cycle will be saved and a new record will be created for the new review percentage.*
5. If you just completed the 100% review of your project, click the checkbox next to "No additional review is needed. Proceed to QAP." After you check this box, the "Review Complete" button will become available at the bottom of the screen. Clicking this button will take you to the final tasks of the Workflow.

Task Name: Review Bid Documents

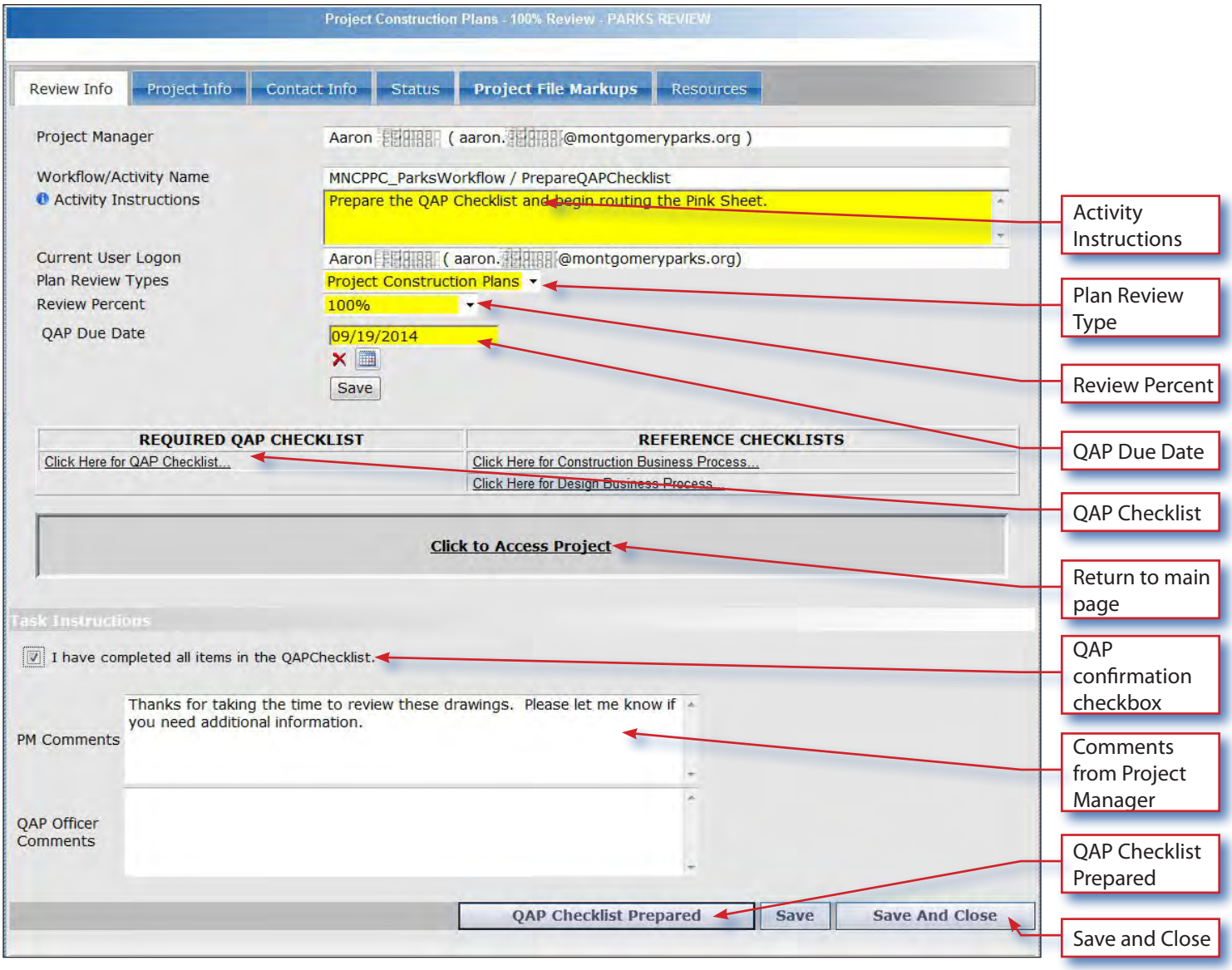
Although the ePlans Workflow provides the tools necessary to review a set of construction drawings, there are several other components to a complete set of bid documents. This task ensures that you review the specifications, bid form and routing sheet necessary to send a project out to bid.

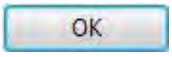


1. A new task will appear in your Task List. Click on the link entitled "AdditionalReviewNeeded."
2. A message will pop up asking if you want to accept the task. Click OK [OK] to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. Review and revise all the bid documents as necessary to prepare them for the QAP Officer's review. *You can upload and review these documents in ePlans if you choose. The Brava Viewer has the capability to review, compare and mark up text documents.*
5. Click the Complete [Complete] button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure you want to complete this task. If so, click OK. [OK] *If you want to leave ePlans and finish this task later, click the Save and Close* [Save and Close] *button.*

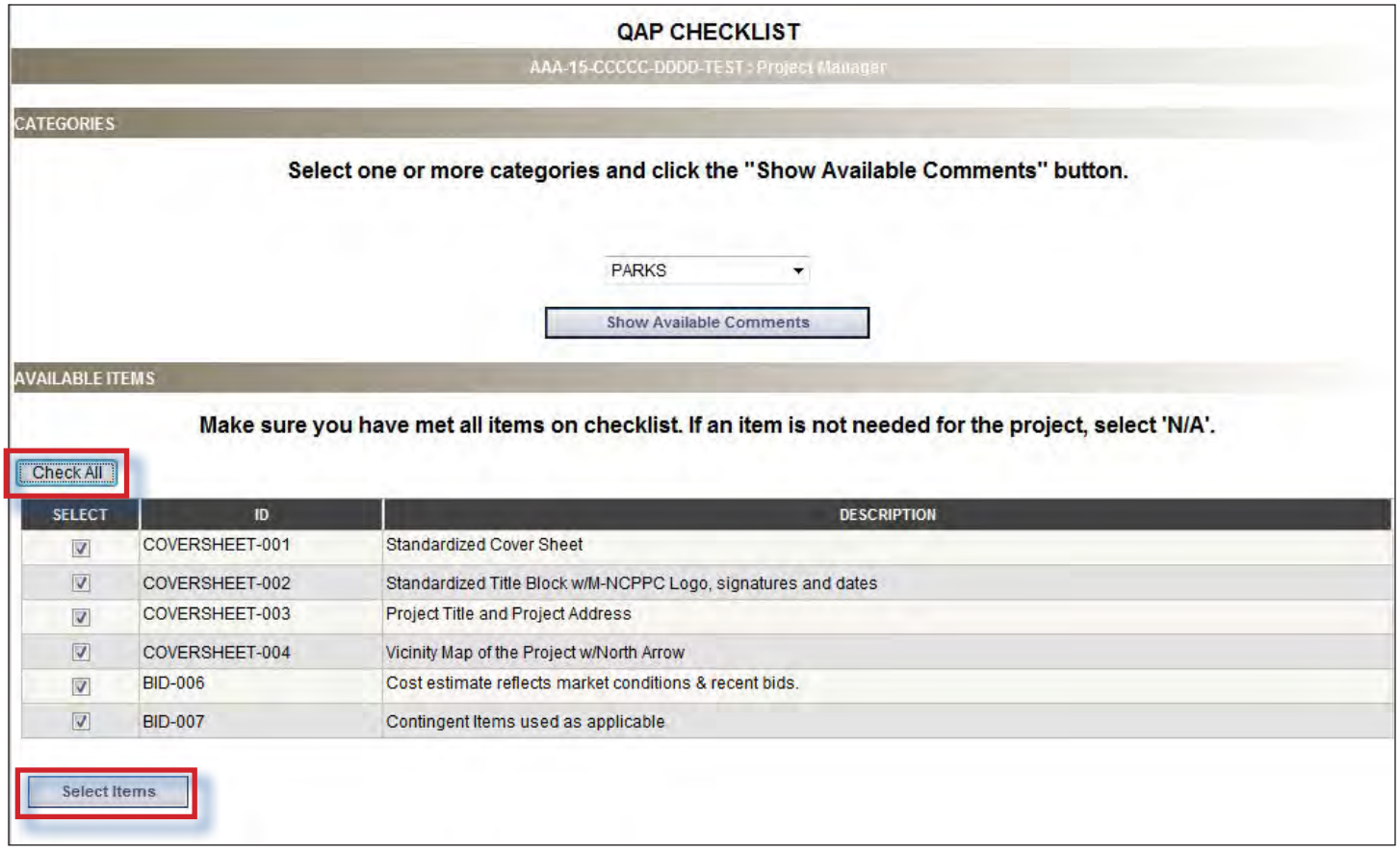
Task Name: Prepare QAP Checklist

Before going out to bid, all construction projects must go through the Quality Assurance Program (QAP). This process ensures that a set of bid documents meets the standards adopted by the Park Development Division. The QAP Review is the one step of the workflow that cannot be bypassed.



1. A new task will appear in your Tasks List. Click on the link entitled "AdditionalReviewNeeded."
2. A message will pop up asking if you want to accept the task. Click OK  to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.

4. Enter the QAP Due Date and click the "Save" Save button. This is the deadline for the QAP Officer to complete his or her review of the drawings.
5. Click the link entitled "Click Here for QAP Checklist." The QAP Checklist page will appear in a new window.

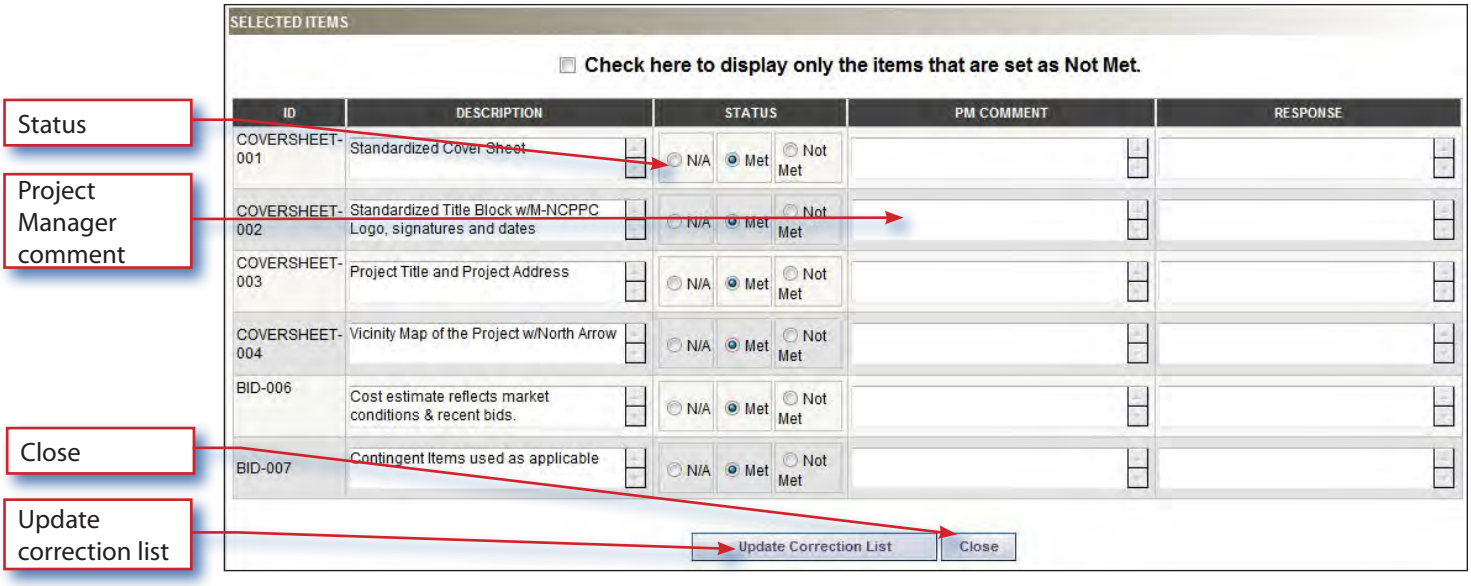


6. At the top of the page, click the Check All Check All button to select all of the items in the QAP Checklist. *Alternately, you can conduct a self-check of the bid documents by checking each once you have determined your documents meet the requirement.*
7. Click the Select Items Select Items button at the bottom of the QAP Checklist. This will move all of the checklist items into the form at the bottom of the page.
8. Select the status for each QAP Checklist item.

   N/A - The checklist item does not apply to this project. Include an explanation in the "PM Comment" column as to why this specific item does not apply to the project.

   Met - This is the default setting for all checklist items. Clicking this radio button indicates that the item has been addressed in the drawings.

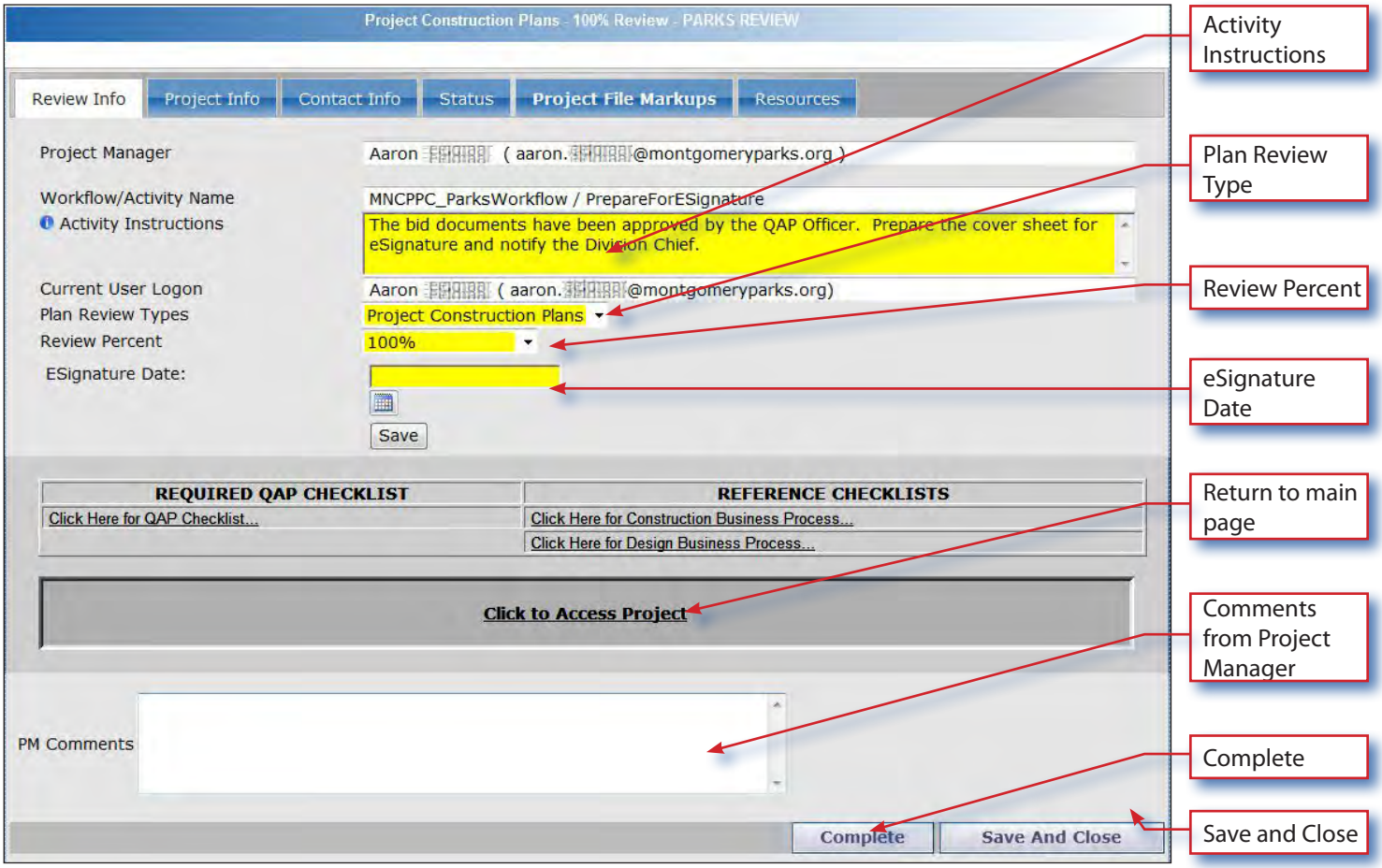
   Not Met - The item has not been addressed in the drawings. Go back and incorporate this items in your bid document. The Workflow prevents you from sending your project to the QAP Officer if any items are marked "Not Met."

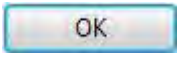
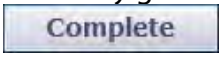
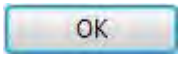
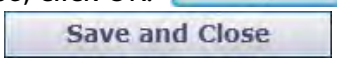


9. When you have finished your review of the checklist, click the Update Correction List button to save the checklist, and then click the Close button to return to the eForm. *If you need to stop work in the middle of this step and return to it later, click the Update Correction List button and then Close to save your progress. Click the QAP Checklist link in the eForm to return to this point.*
10. Once you are ready to send your project to the QAP Officer, check the box entitled, "I have completed all the items in the QAP Checklist," and the QAP Checklist Prepared button should become active. *If the text on the QAP Checklist Prepared button does not change from grey to black, you will need to refresh the eForm, either by clicking the Reloadnbutton on your internet browser, or closing the eForm and reopening it through the Tasks List.*
11. Enter any general comments to the QAP Officer in the PM Comments field and then click the QAP Checklist Prepared button at the bottom of the screen. You will be asked if you are sure you want to complete this task. If so, click OK. *If you want to leave ePlans and finish this task later, click the Save and Close button.*
12. The QAP Officer will now conduct his or her review of the bid documents. If he or she rejects the set for any reason, you will need to repeat this task until the QAP Officer approves the documents.
13. Once the QAP Officer approves the bid documents, you are ready to move on to the next task.

Task Name: Prepare eSignature

After the QAP Officer approves the bid set, you are ready to initiate the procurement process. This task verifies that you have completed all the necessary steps and quality control checks in the Workflow.



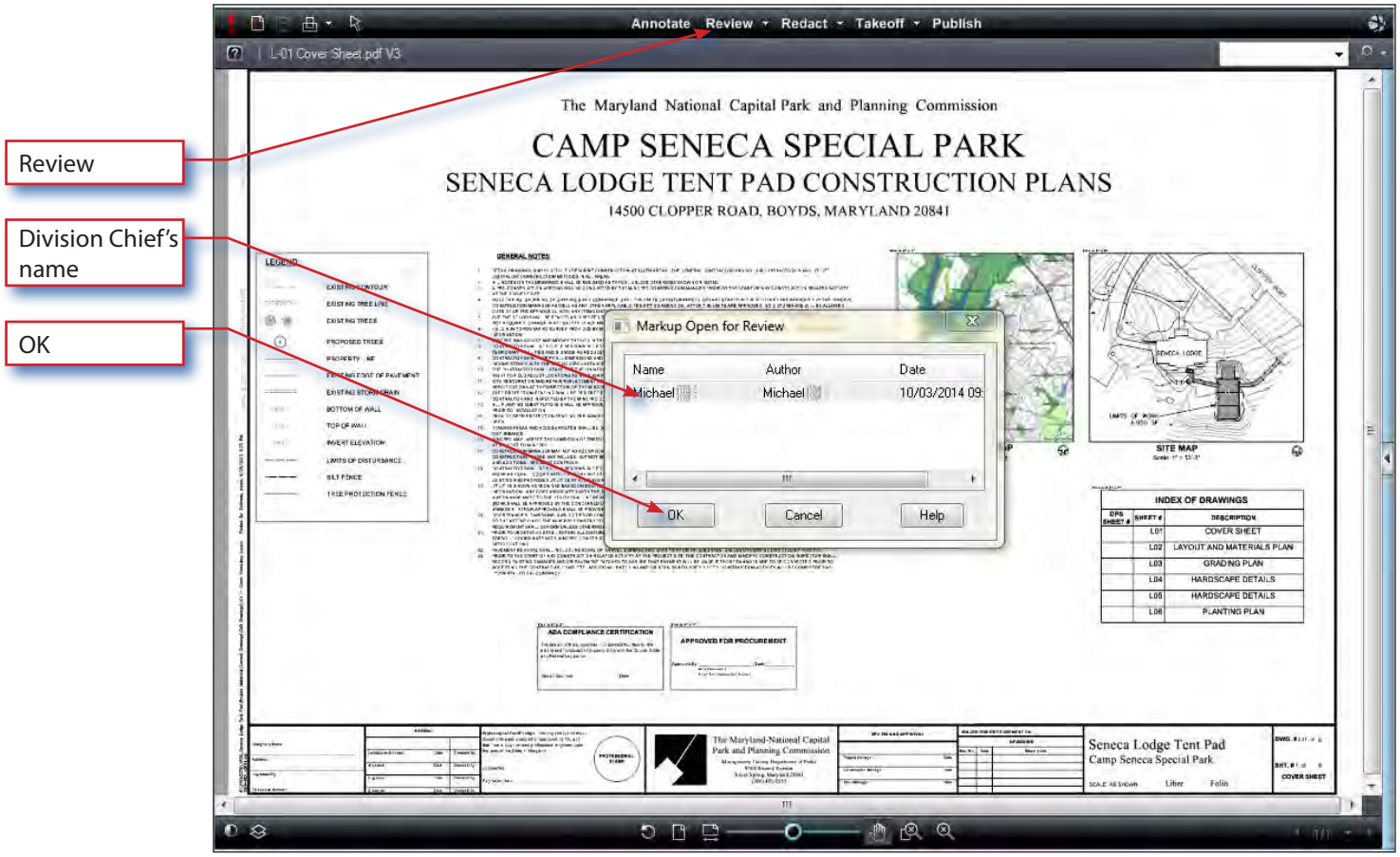
1. A new task will appear in your Tasks List. Click on the link entitled "PrepareForESignature."
2. A message will pop up asking if you want to accept the task. Click OK  to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. Enter the eSignature Date and click the Save button. This is the deadline for the Division Chief to apply his or her eSignature to the drawing set.
5. Enter any general comments to the Division Chief in the PM Comments field and click the Complete  button at the bottom of the screen. You will be asked if you are sure you want to complete this task. If so, click OK.  *If you want to leave ePlans and finish this task later, click the Save and Close*  *button.*
6. Once the Division Chief applies his or her eSignature to the cover sheet of the construction drawings, you will receive an email instructing you to proceed with the procurement process.

ESignature Complete

Congratulations! The Division Chief has applied the final signature to the project **AAA-15-CCCCC-DDDD-TEST**. The workflow is complete and you may now commence the procurement process.

Project Number & Name: AAA-15-CCCCC-DDDD-TEST - Test Project
Plan Type: Project Construction Plans - 100% Review
Consultant:
Project Manager: Aaron [redacted] (aaron.[redacted]@montgomeryparks.org)
Resource Links: eplans User Guide

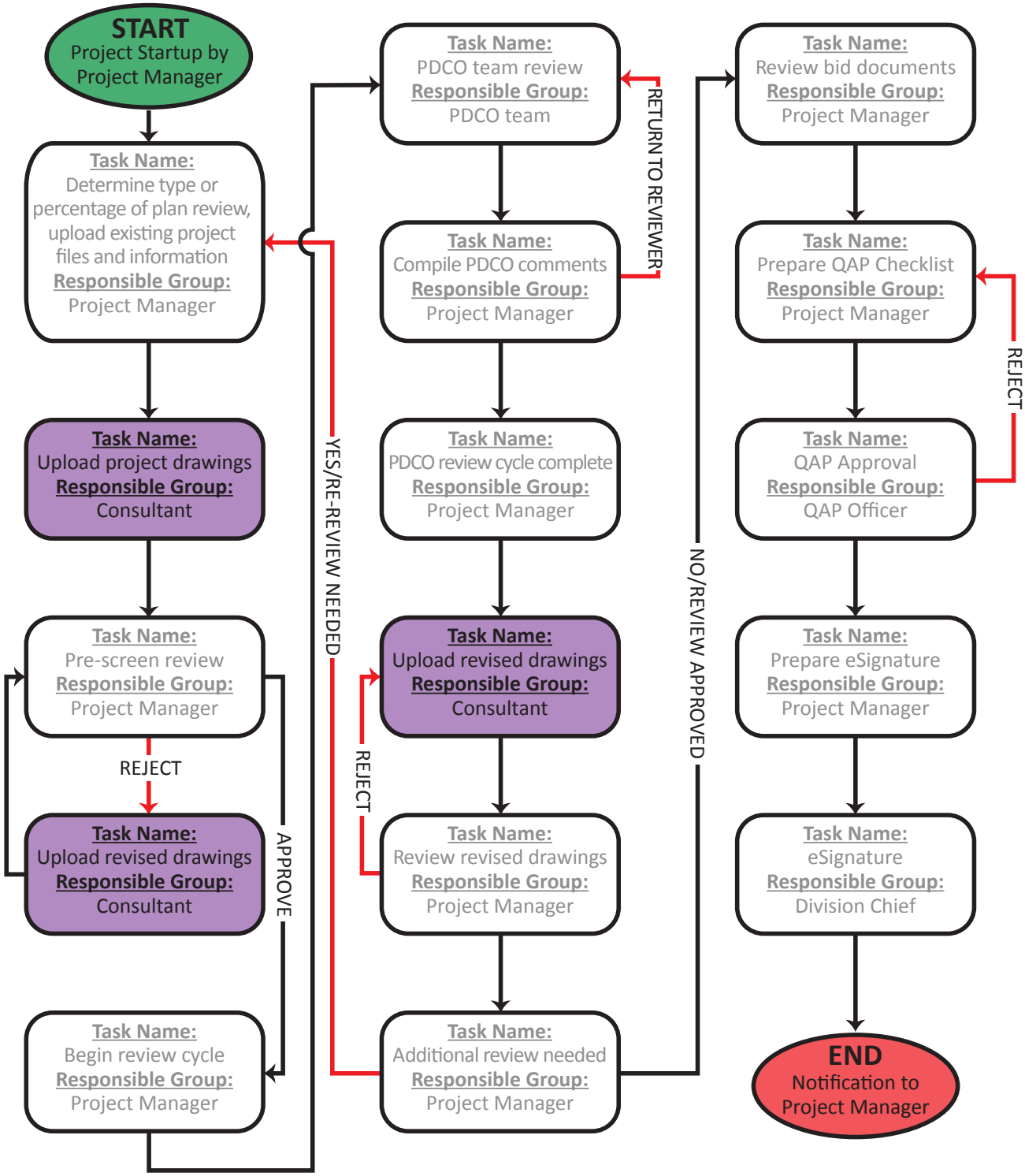
7. You can view the Division Chief's eSignature by opening the project's cover sheet in the Brava Viewer (click the thumbnail of the cover sheet in the file list of the project's main page).
8. Click the Review **Review** button at the top of the Brava Viewer. A window entitled "Markup Open for Review" will appear.
9. Select the Division Chief's name from the list and click OK. **OK** The eSignature and the date will appear in the "Approved for Procurement" box on the cover sheet.
10. Refer to the Other Functions section for instruction on publishing a copy of the cover sheet with the eSignature (this process is identical to Publishing Changemarks.)



WORKFLOWS: CONSULTANT

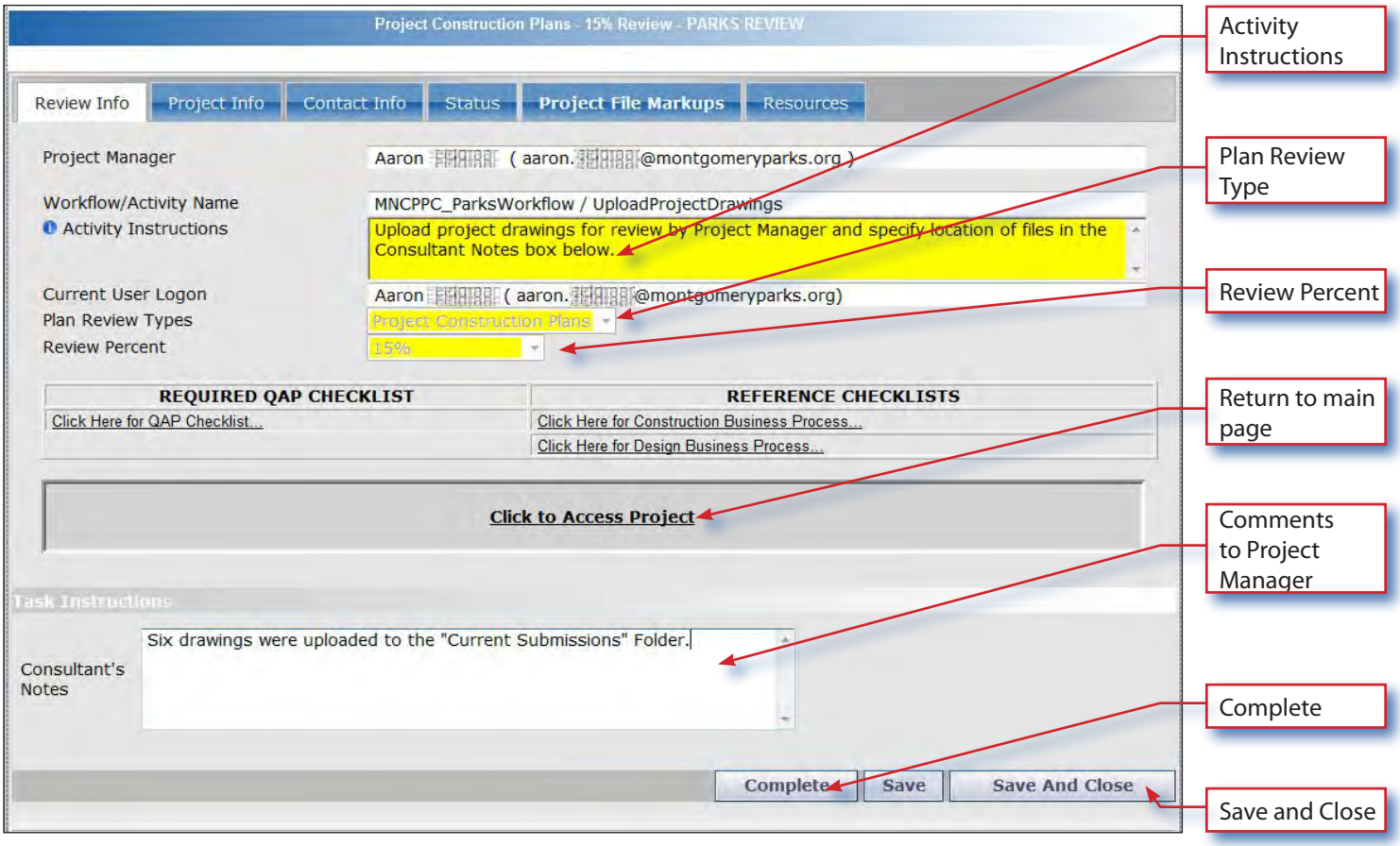
Consultant

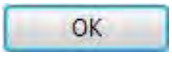
This section describes all of the Consultant's tasks within the Workflow.



Task Name: Upload Project Drawings

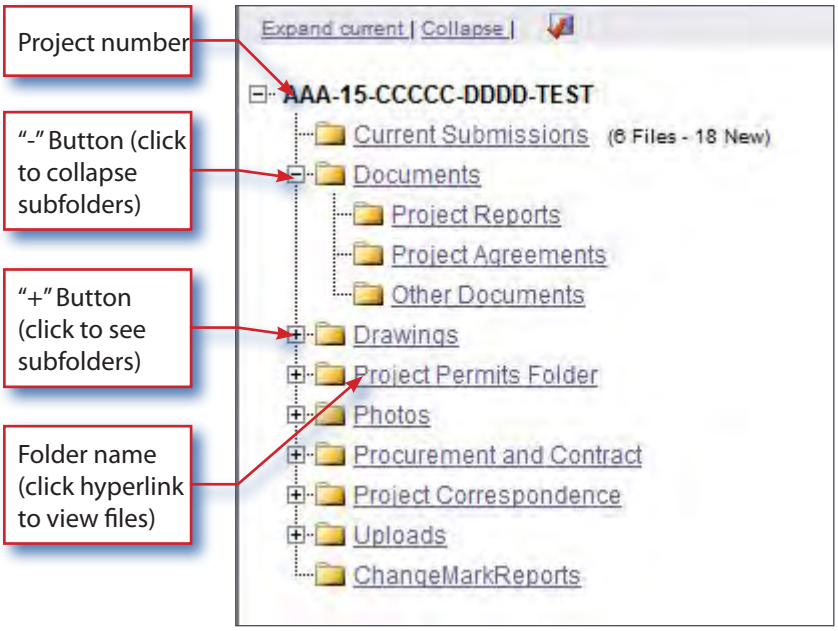
The Project Manager from the Park Development Division will create a project in ePlans and send you an email inviting you to join the project. If this is your first time logging on to ePlans, you will need to follow the steps in the Getting Started section before continuing. As the Consultant, your first task is to upload your drawings into ePlans for review by the Project Manager and the PDCO Team.

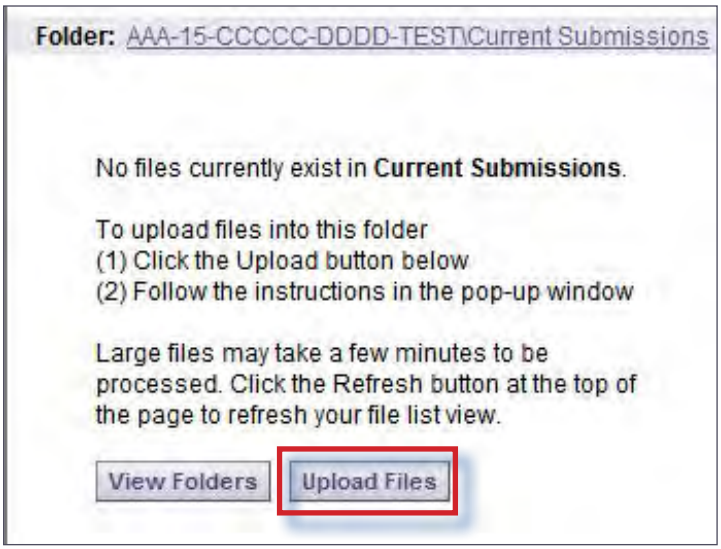


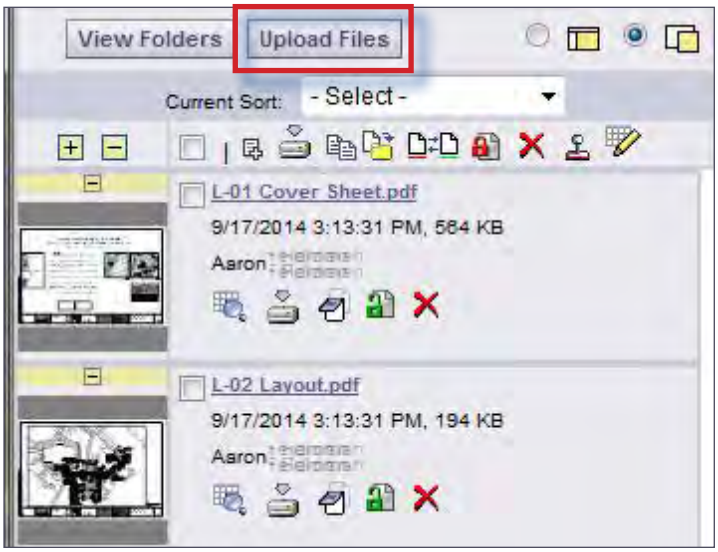
1. Before you begin, make sure your project drawings are saved as individual PDF files, with each plan sheet rotated to the proper orientation. *Files with multiple sheets, or improperly rotated drawings will be rejected by the Project Manager.*
2. A new task will appear in your Tasks List. Click on the link entitled "UploadProjectDrawings."
3. A message will pop up asking if you want to accept the task. Click OK 

to accept the task and open the eForm.
4. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
5. To upload project files, click the link entitled "Click to Access Project" in the middle of the eForm. This will take you to the project's file list. *The file list also appears at the left side of the screen on the project's main page.*

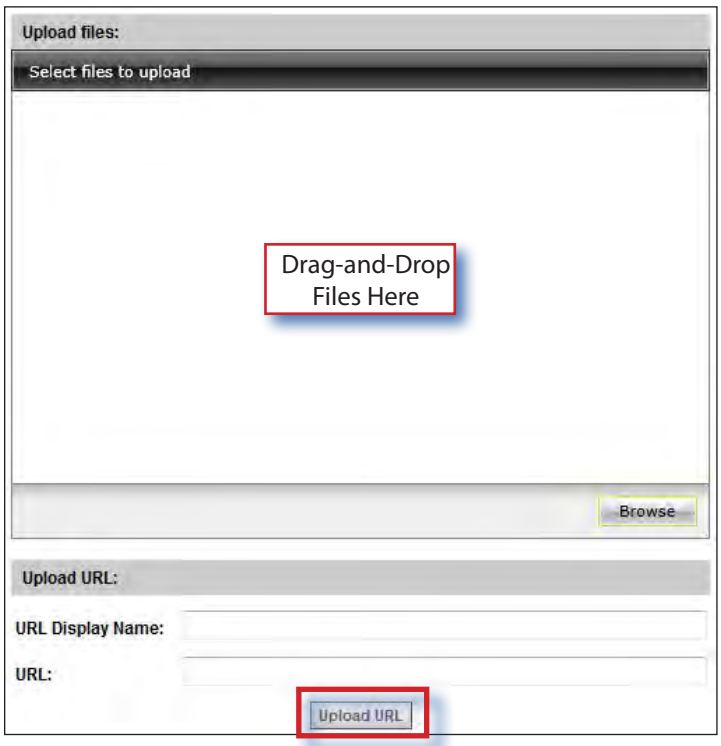
6. Click the name of the folder to which you would like to upload files. Unless the Project Manager directs you otherwise, submission drawings should always be uploaded to the "Current Submission" folder.
7. Click the name of the folder to which you would like to upload files.
8. Click the Upload Files [Upload Files] button and a new window will appear allowing you to upload files. *If the destination folder is empty, you a set of instructions for uploading files will appear where the project's file list was. If there are already files in the folder the Upload Files"button will appear at the top of the file list.*

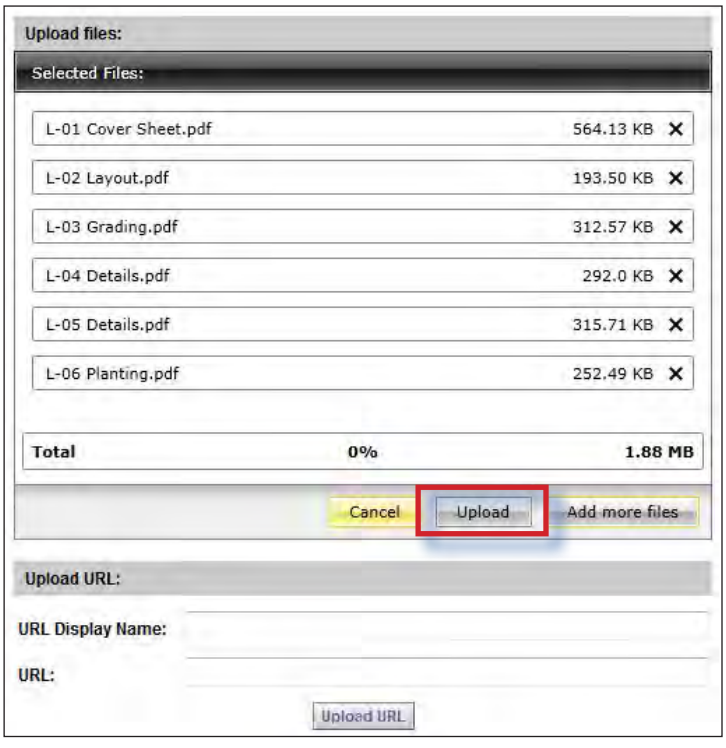



Folder: AAA-15-CCCCC-DDDD-TEST\Current Submissions
No files currently exist in Current Submissions.
To upload files into this folder
(1) Click the Upload button below
(2) Follow the instructions in the pop-up window
Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your file list view.
View Folders
Upload Files



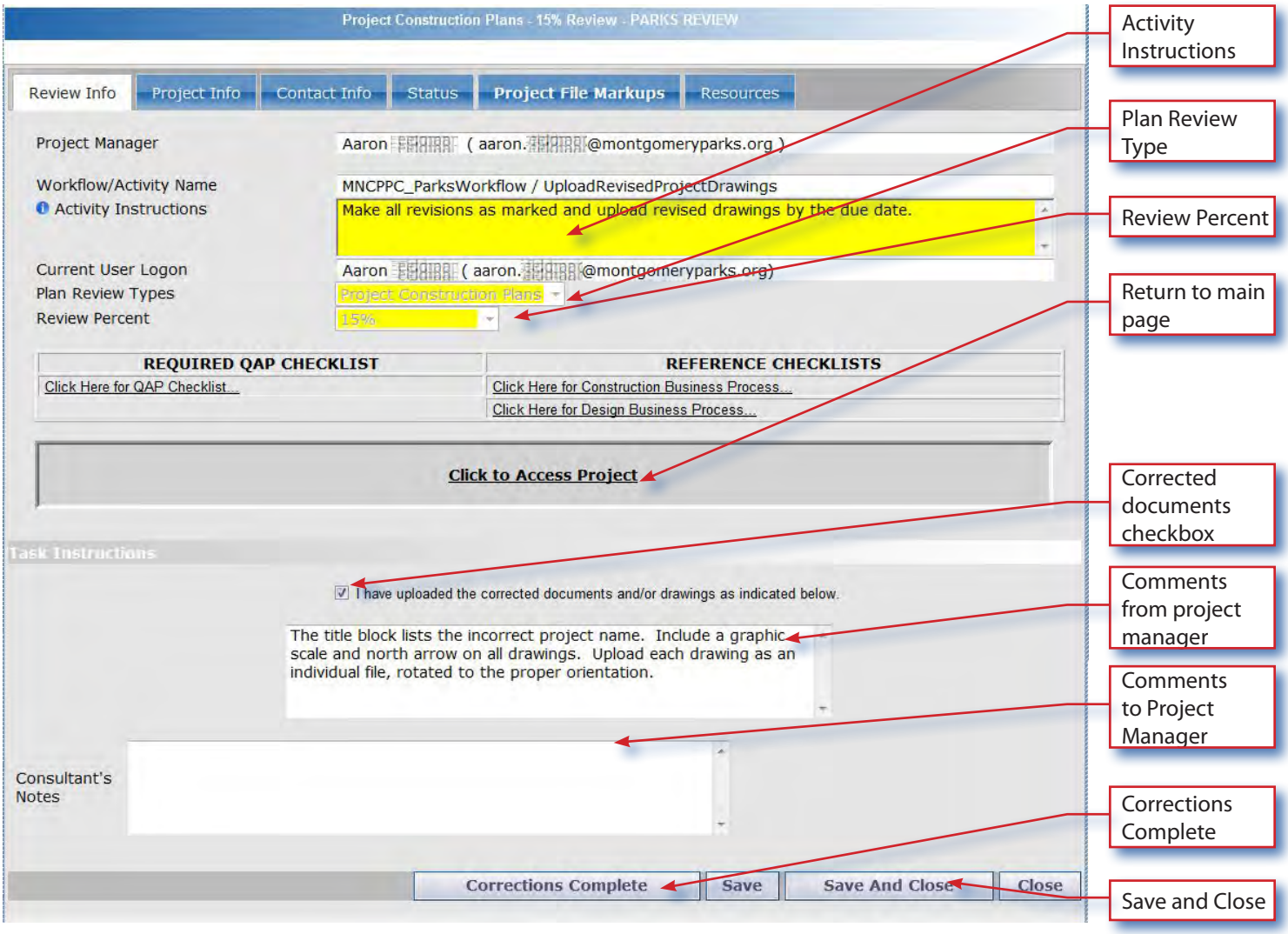
9. Click the Browse Browse button, and a Windows Explorer window will open. *You can also open Windows Explorer on your own and drag-and-drop files directly.*
10. Navigate to the files you want to upload from your computer or local server file to ePlans. Highlight the desired files and click the Open Open button. *Hold down the "Control" key to select multiple files.*
11. Click the Upload Upload button to upload the files.
12. Once you are finished uploading files, return to the eForm. *If you closed the eForm, you can get back to it by clicking on the task in the Tasks List (see Step 2).*
13. Click the Complete Complete button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure you want to complete this task. If so, click the OK OK button. *If you want to leave ePlans and finish this task later, click the Save and Close Save and Close button.*
14. You are now finished with this task, and it will disappear from your Task List.
15. You can upload additional files at any time by going to the folder list at the left side of the project's Main Page and following steps 6-11 above.





Task Name: Upload Revised Drawings (Following Pre-Screen Review)

The Project Manager will review the drawings you uploaded to make sure they are ready to be sent to the PDCO Team for their review. If the Project Manager finds any issues that will hinder a complete PDCO Team review, he or she will reject the drawings and request that you revise your drawings and upload them a gain. If your drawings are approved on the first submission, you will skip this task.


Project Construction Plans - 15% Review - PARKS REVIEW
Review Info
Project Info
Contact Info
Status
Project File Markups
Resources
Project Manager
Aaron (aaron.@montgomeryparks.org)
Workflow/Activity Name
MNCPPC_ParksWorkflow / UploadRevisedProjectDrawings
Activity Instructions
Make all revisions as marked and upload revised drawings by the due date.
Current User Logon
Aaron (aaron.@montgomeryparks.org)
Plan Review Types
Project Construction Plans
Review Percent
15%
REQUIRED QAP CHECKLIST
REFERENCE CHECKLISTS
Click Here for QAP Checklist...
Click Here for Construction Business Process...
Click Here for Design Business Process...
Click to Access Project
Task Instructions
I have uploaded the corrected documents and/or drawings as indicated below.
The title block lists the incorrect project name. Include a graphic scale and north arrow on all drawings. Upload each drawing as an individual file, rotated to the proper orientation.
Consultant's Notes
Corrections Complete
Save
Save And Close
Close
Activity Instructions
Plan Review Type
Review Percent
Return to main page
Corrected documents checkbox
Comments from project manager
Comments to Project Manager
Corrections Complete
Save and Close

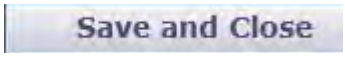
1. Before you begin, make sure your files have the exact same names as on your previous submission. *This will enable Versioning. ePlans will recognize identical file names and save both files, allowing you to compare the old file with the new one.*
2. A new task will appear in your Task List. Click on the link entitled "UploadRevisedDrawings."
3. A message will pop up asking if you want to accept the task. Click OK

to accept the task and open the eForm.
4. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.

5. The Task Instructions field will contain instructions from the Project Manager about what revisions you need to make.
6. Follow the Project Manager's instructions and upload the revised drawings, following the same steps as in the "Upload Project Drawings" task. *Be sure to use the exact same file names as you did for the previous submission.*
7. Return to the eForm and click the checkbox entitled "I have uploaded the corrected documents and/or drawings as indicated below."
8. Add any additional comments or notes in the Consultant's Notes field.
9. Click the Complete

button at the bottom of the eForm to finish this task and move on.

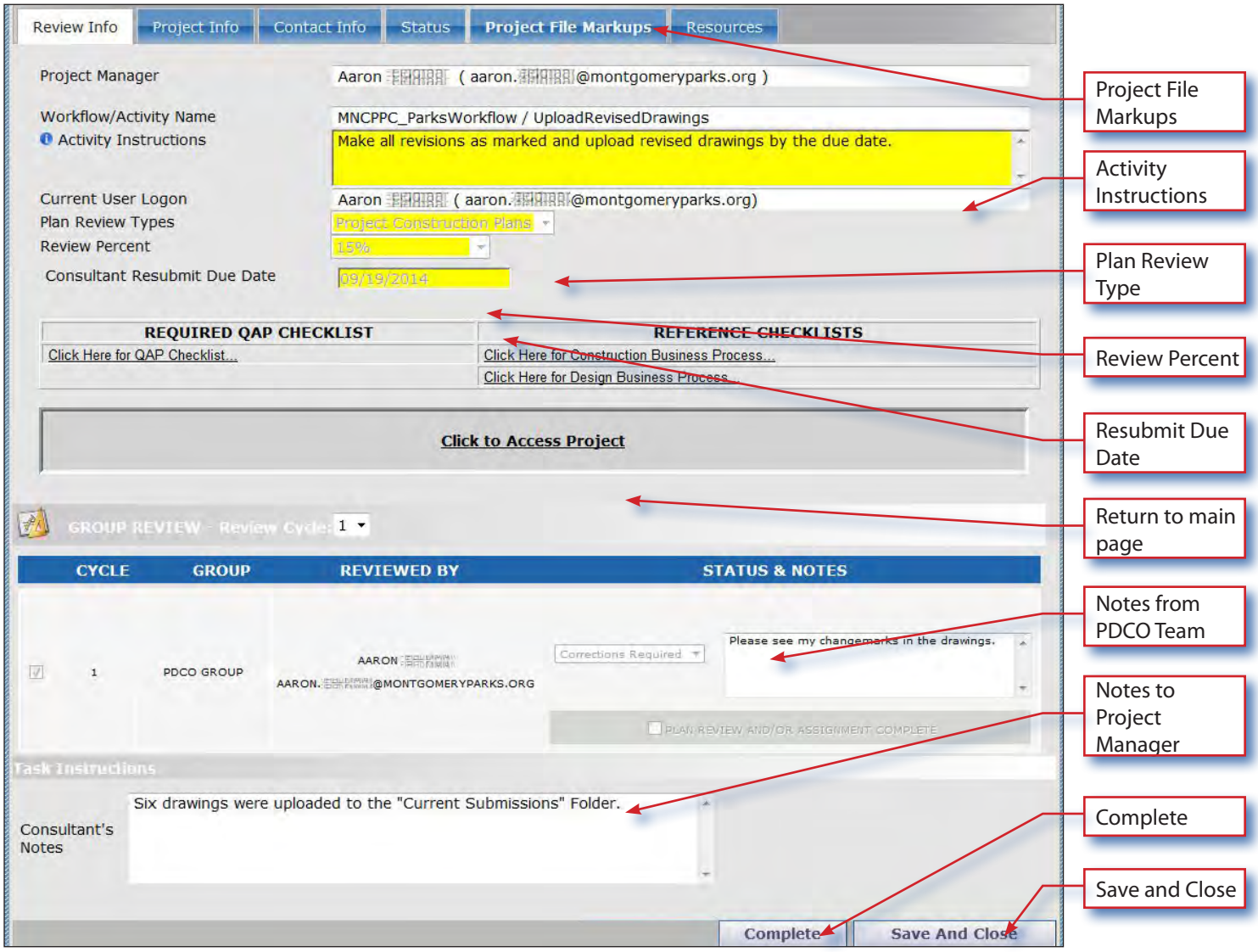
   You will be asked if you are sure you want to complete this task. If so, click the OK

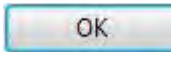
button. *If you want to leave ePlans and finish this task later, click the Save and Close* 

button.
10. You are now finished with this task, and it will disappear from your Task List. This task will be repeated as necessary until the Project Manager approves the drawings for review by the PDCO Team.
11. You can upload additional files at any time by going to the folder list at the left side of the project's Main Page and following steps 6 through 11 in the "Upload Project Drawings" task.

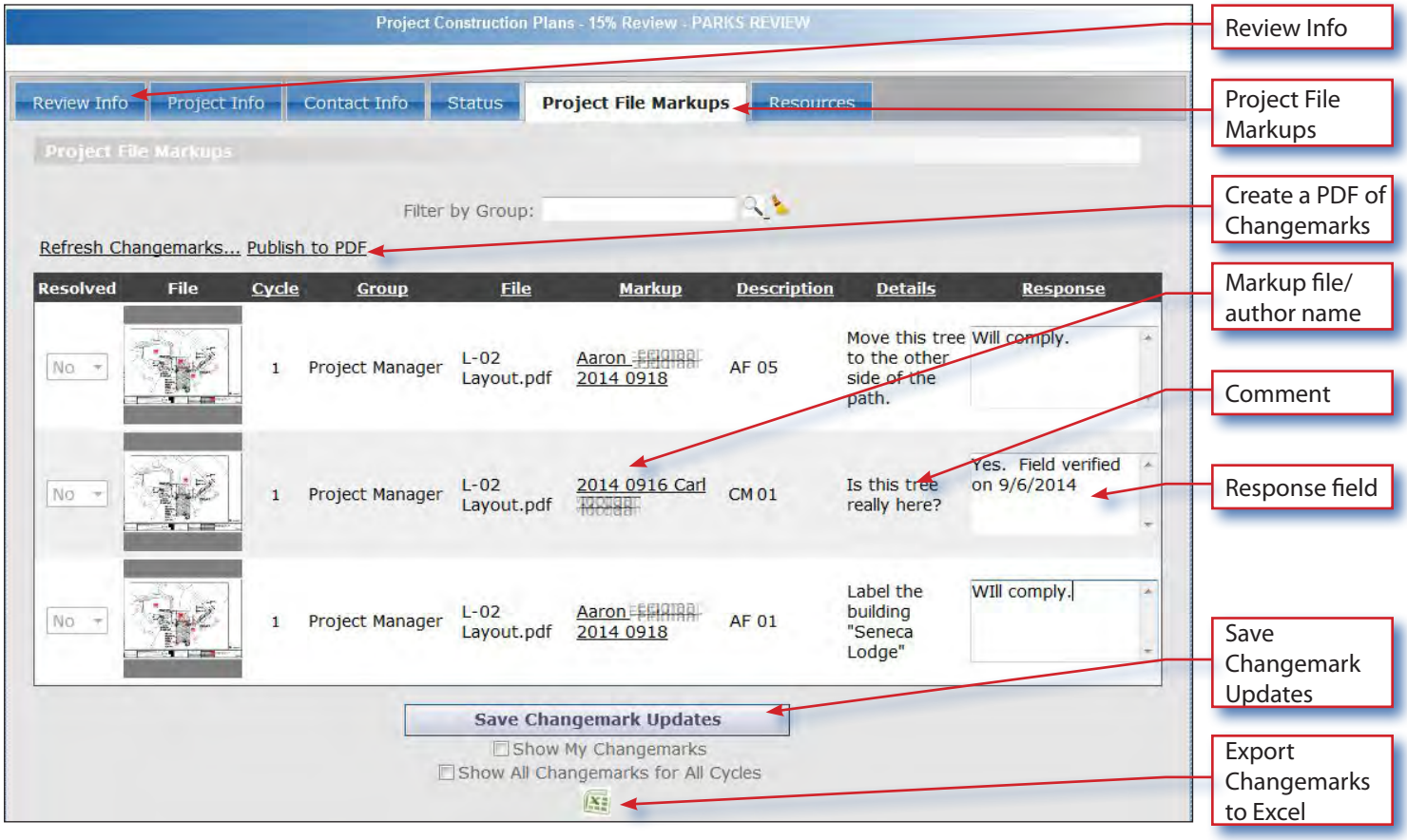
Task Name: Upload Revised Drawings (Following PDCO Team Review)

Once the Project Manager reviews and compiles all of the PDCO Team comments, you will receive an Email notifying you that revisions need to be made to the drawings. The Project Manager will also provide you with a Consultant Resubmit Due Date.



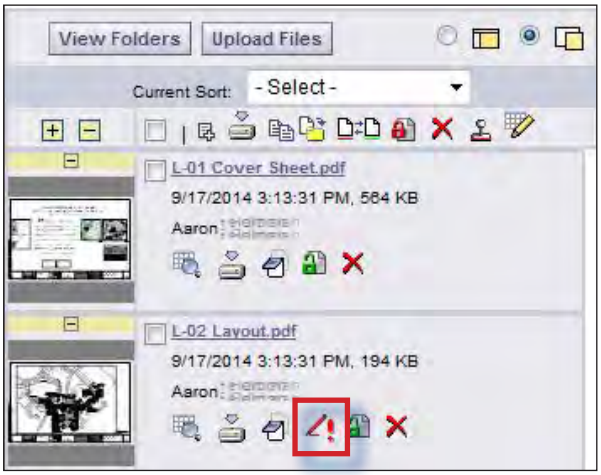
1. A new task will appear in your Tasks List. Click on the link entitled "UploadRevisedDrawings."
2. A message will pop up asking if you want to accept the task. Click OK 

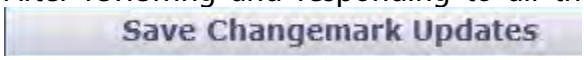
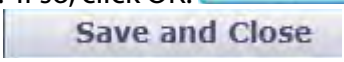
to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow.
4. The bottom of the eForm will contain general comments from each PDCO Team Member. Click the Project File Markups tab at the top of the eForm to see a list of each Changemark made by the PDCO Team for the entire drawing set.



5. Respond to each Changemark by entering a note in the Response field for that Changemark. *Be sure to respond to all Changemarks, even if the response is as simple as "will comply." This lets the Project Manager know that you have reviewed and considered every Changemark.*

6. You can view and edit Changemarks within the context of an individual drawing by navigating back to the file list on the project's main page and selecting the folder to which the Consultant's drawings are saved (this is usually the Current Submissions folder). *Do not close the eForm while you are viewing Changemarks, it may be helpful to toggle back and forth between the two screens.*

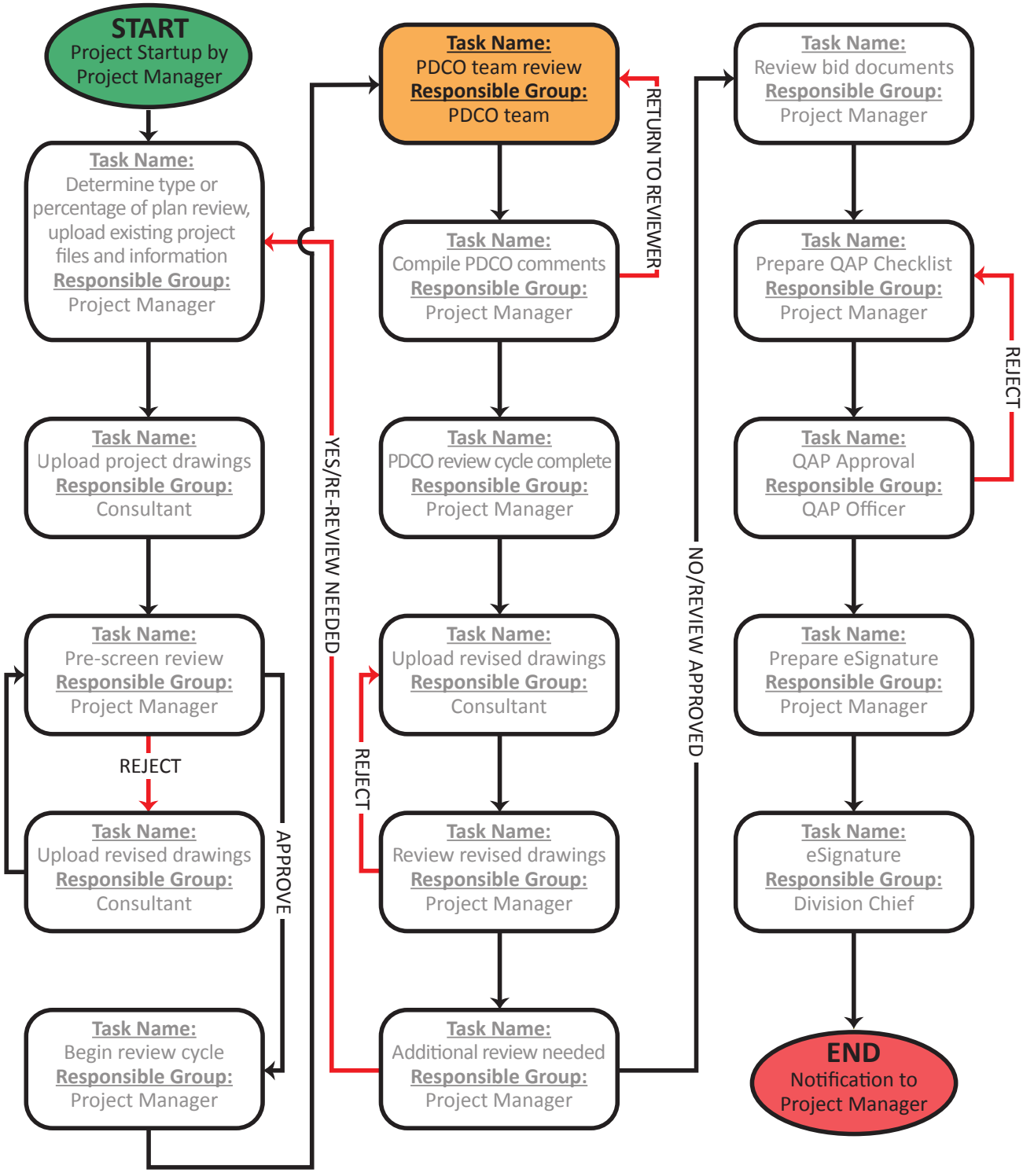


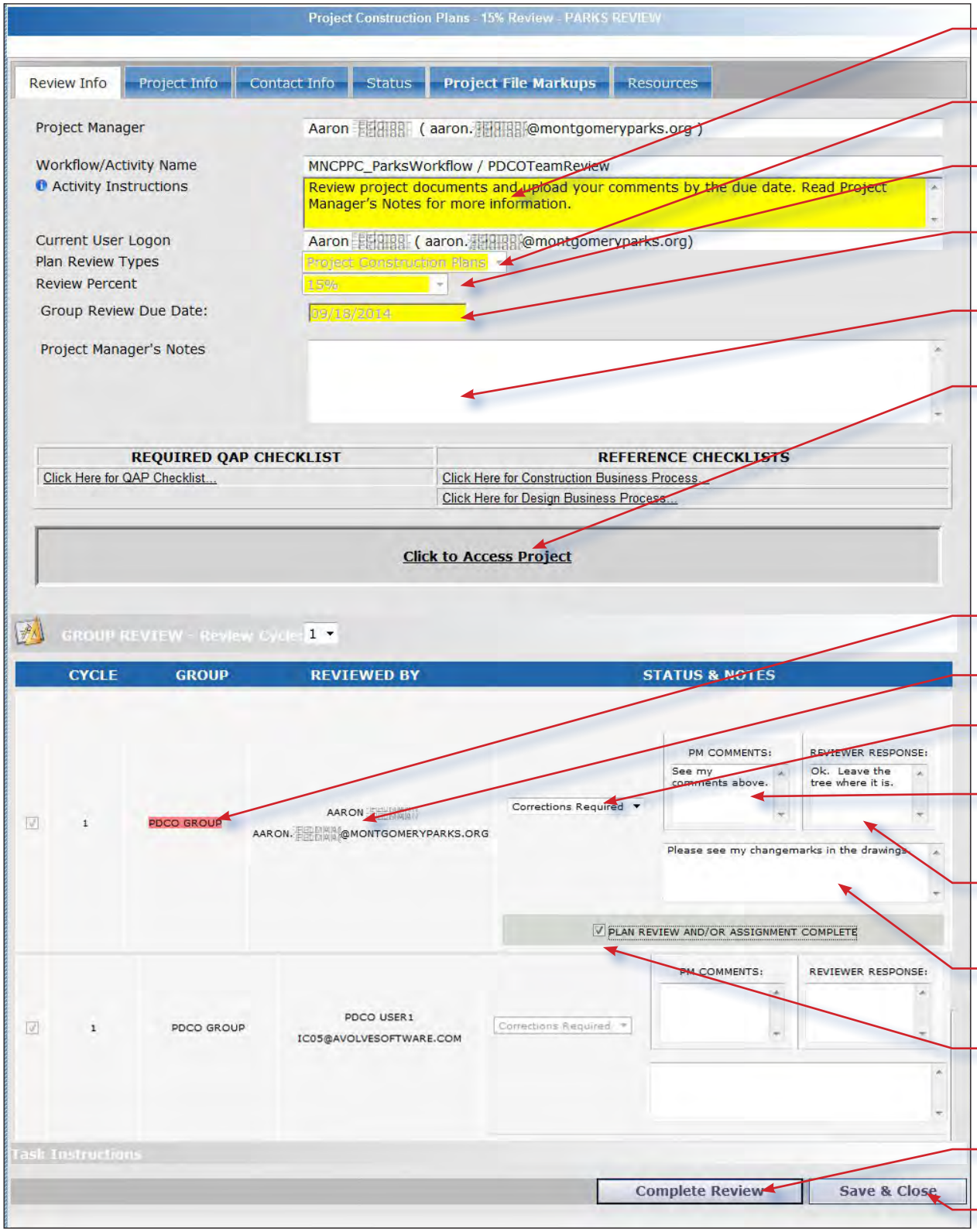
7. If Changemarks exist within a drawing, the Markups icon will appear below the file name. Click the Markups icon and the View Markups screen will appear. *You can view all of a project's markups outside of the Workflow by generating a Project Markups Listing from the Reports tab. Instructions for generating reports can be found in the Reporting section of the Other Functions tab*
8. Once you select the markup you want to view or edit, click the View button. The drawing and all the selected markups will appear in the Brava Viewer. Here you can use the toolbar at the bottom of the screen to navigate to different areas of the drawing. *You can also click individual Changemarks to see the text of each.*
9. After reviewing and responding to all the Changemarks, click the Save Changemark Updates  button in the Project File Markups tab of the eForm and then click the Review Info tab at the top of the eForm.
10. After making all the necessary revisions to your drawings, make sure the file names of your revised drawings are identical to those of the original drawings. This will enable versioning, which allows users to overlay multiple files of the same name on top of each other to see changes from version to version. *Keeping identical file names does not overwrite older files with new ones; all previous versions of a file are still accessible on ePlans.*
11. Upload your revised drawings by following the instructions in the "Upload Project Drawings" task.
12. Type any additional instructions or general notes to the Project Manager in the Consultant's Notes field.
13. Click the "Complete" button at the bottom of the eForm to finish this task and move on. You will be asked if you are sure you want to complete this task. If so, click OK. *If you want to leave ePlans and finish this task later, click the Save and Close*  *button.*
14. You are now finished with this task and it will disappear from your Task List. This task will be repeated as necessary, until the Project Manager accepts the drawings.

WORKFLOWS:
PDCO TEAM

PDCO Team

This section describes the PDCO Team's task within the Workflow.

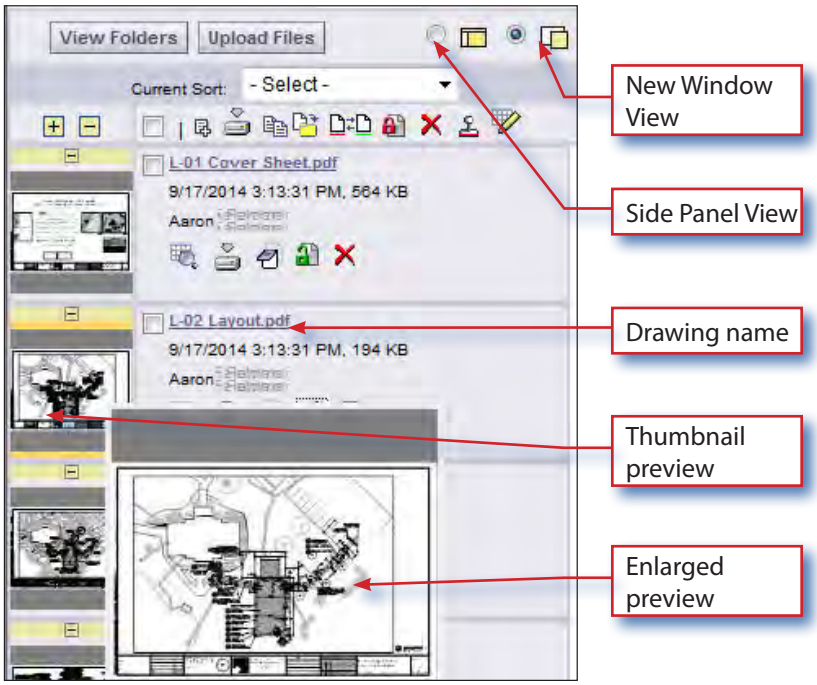



Project Construction Plans - 15% Review - PARKS REVIEW
Review Info
Project Info
Contact Info
Status
Project File Markups
Resources
Project Manager
Aaron (aaron.@montgomeryparks.org)
Workflow/Activity Name
MNCPPC_ParksWorkflow / PDCOTeamReview
Activity Instructions
Review project documents and upload your comments by the due date. Read Project Manager's Notes for more information.
Current User Logon
Aaron (aaron.@montgomeryparks.org)
Plan Review Types
Project Construction Plans
Review Percent
15%
Group Review Due Date:
09/18/2014
Project Manager's Notes
REQUIRED QAP CHECKLIST
REFERENCE CHECKLISTS
Click Here for QAP Checklist...
Click Here for Construction Business Process...
Click Here for Design Business Process...
Click to Access Project
GROUP REVIEW - Review Cycle: 1
CYCLE
GROUP
REVIEWED BY
STATUS & NOTES
PM COMMENTS:
REVIEWER RESPONSE:
See my comments above.
Ok. Leave the tree where it is.
1
PDCO GROUP
AARON
AARON.@MONTGOMERYPARKS.ORG
Corrections Required
Please see my changemarks in the drawings
PLAN REVIEW AND/OR ASSIGNMENT COMPLETE
PM COMMENTS:
REVIEWER RESPONSE:
1
PDCO GROUP
PDCO USER1
IC05@AVOLVESOFTWARE.COM
Corrections Required
Task Instructions
Complete Review
Save & Close
Activity Instructions
Plan Review Type
Review Percent
Group Review Due Date
Notes from Project Manager
Return to main page
Highlighted group title
User name
Review status
Notes from Project Manager
Notes to Project Manager
General drawing notes
Review complete checkbox
Complete Review
Save and Close

Task Name: PDCO Team Review

The Project Manager from the Park Development Division will create project in ePlans and send you an email inviting you to join the project. If this is your first time logging in to ePlans, you will need to follow the instructions under the Getting Started tab before continuing. As a PDCO Team member, your main responsibility in the Workflow is to review the Consultant's drawings as they relate to your specific work program.

1. A new task will appear in your Tasks List. Click on the link entitled "PDCOTeamReview."
2. A message will pop up asking if you want to accept the task. Click OK [OK] to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. The Project Manager has already filled out the type of project, level of completion (Percent Review), and the deadline for you to complete your review (Group Review Due Date). Additionally, the Project Manager's Notes field may include information about the submission you are about to review, such as the location of the project files within ePlans.
4. To review the Consultant's drawings, click the link entitled "Click to Access Project." This will take you to the File List on the project's main page. If there are no drawings in this submission relevant to your PDCO Team role, you can skip to Step 20 of this task.
5. The project's file list will appear on the left side of the screen. Unless the Project Manager directs you otherwise, the drawings for review should be in the "Current Submissions" folder. Click the folder's name to see a thumbnail preview of all the drawings. Hover your cursor over one of the thumbnails to see a slightly enlarged preview. The File Management section under the "Other Functions" tab contains additional details about the different functions available in the file list.



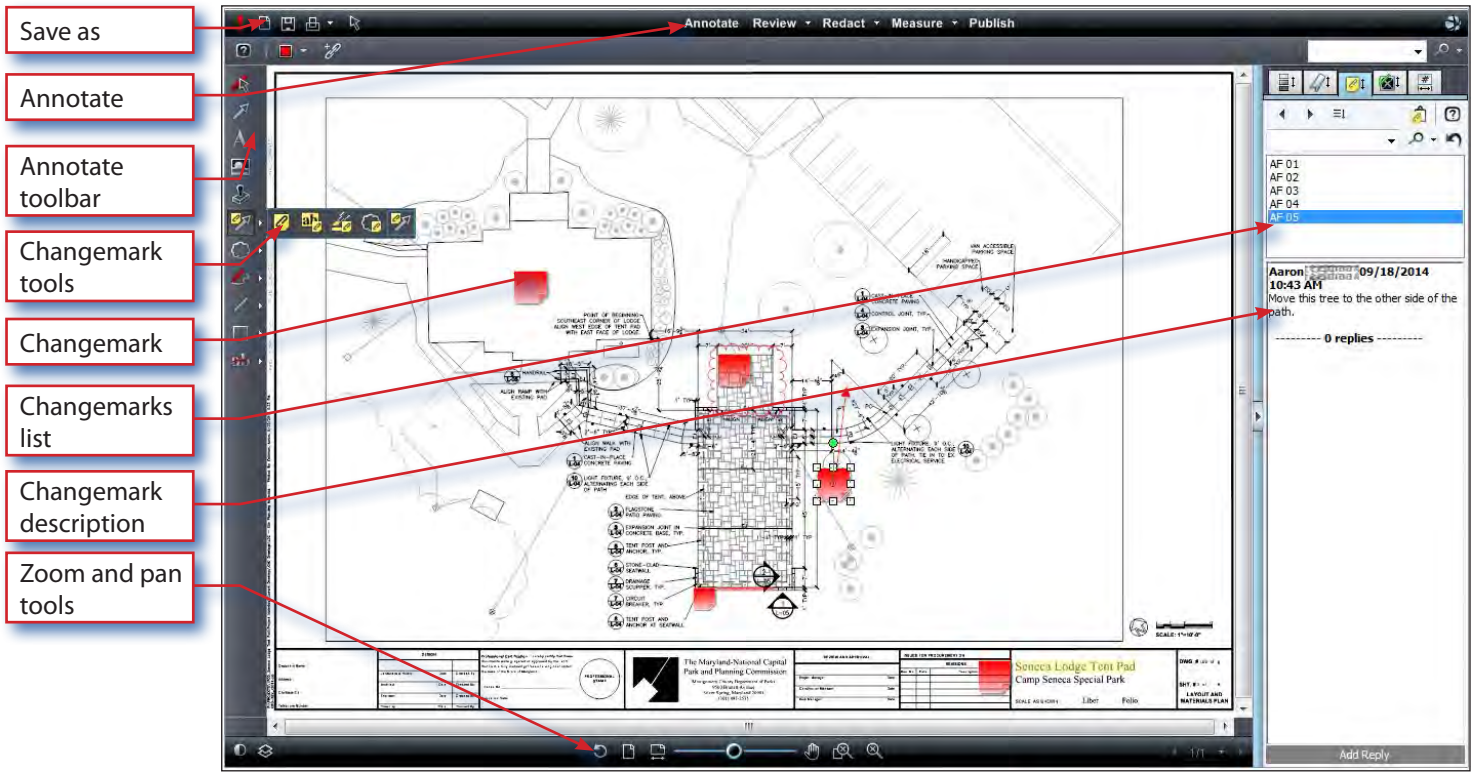
6. Before viewing the Consultant's drawings, set your viewer preference by clicking the radio button for the view you would like to use:

   Side Panel View - The drawings will appear in the same window as the file list, in the place of the Project Info Panel. This setting reduces the number of windows you have open, making desktop navigation simpler.

   New Window View - Each drawing selected will open a new window. This setting allows for a larger viewing area for each drawing, but you will have to shuffle through multiple windows.

7. To view a drawing, click the drawing's name or its thumbnail image. This will launch the Brava Viewer. Use the toolbar at the bottom of the viewer to navigate around the drawing. To view another drawing, click on another drawing's name or thumbnail image.

8. To conduct your review, click the Annotate button at the top of the Brava Viewer, and a toolbar will appear to the left of the drawing.



9. Click the small arrow to the right of the Changemarks icon to expand the Changemarks toolbar. Click the appropriate icon, described below, to initiate a Changemark and then select the location for your Changemark.

   Changemark - Creates a Changemark note (looks like a Post-It Note) without any associated line-work. Click once in the drawing at the desired location to create. Click and hold to resize.

   Changemark Text Highlight - Associates a Changemark with a specific line of text highlighted in a document. Highlight the block of text to which you want to call attention. *Depending on how the PDF you are viewing was created, this button may not always be available.*

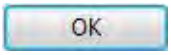
   Changemark Highlight - Creates a colored box and associated Changemark. Click your left mouse button at the starting point of the desired area to highlight, and hold your mouse button down. Drag the mouse to cover the area you want to highlight.

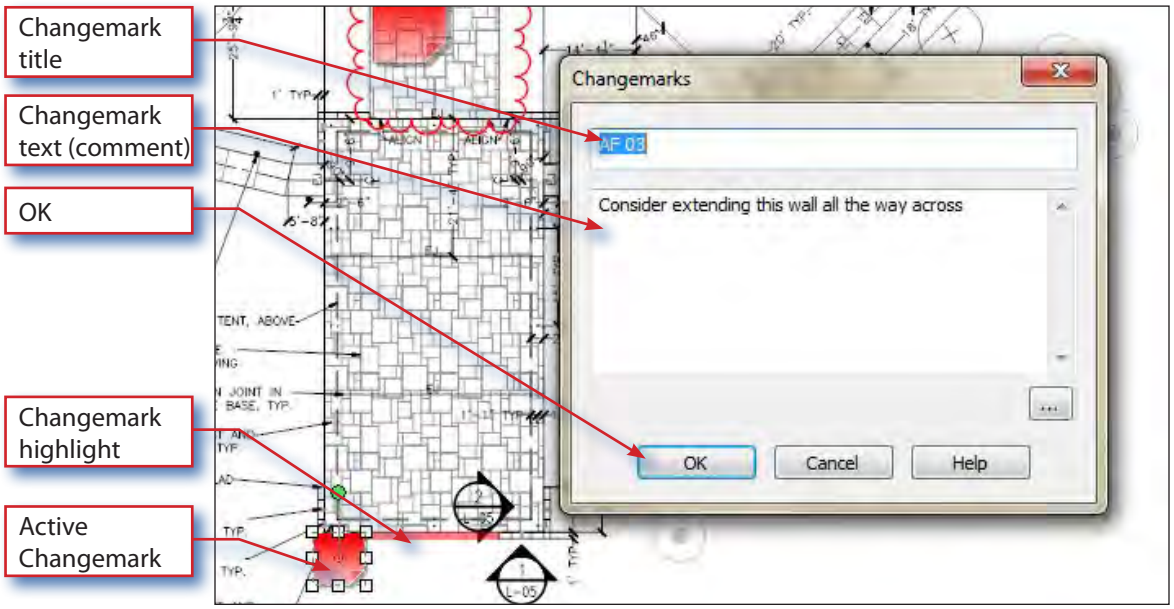
   Changemark Revision Cloud - Creates a revision cloud and associated Changemark. Click your left mouse button at the starting point of the desired area to cloud and hold your mouse button down. Drag the mouse to cover the desired area and release the mouse button to create.

   Changemark Arrow - Creates an arrow and associated Changemark. Click your left mouse button at the end point of the arrow and hold your mouse button down. Drag the mouse to the beginning point of your arrow and release the mouse button to create.

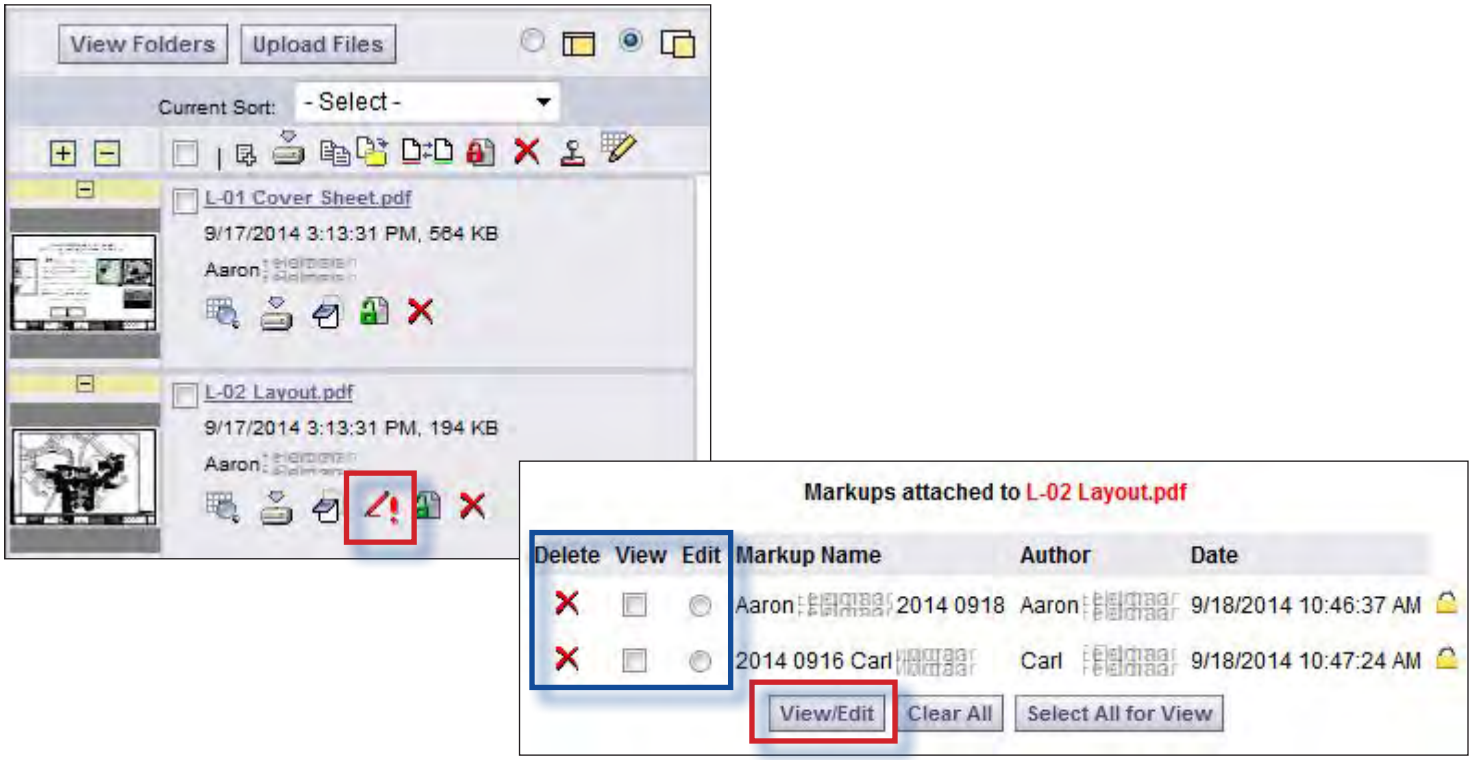
10. After designating the location of your Changemark, an icon resembling a Post-It Note will appear, along with the Changemarks Dialog Box.

11. Provide a unique title for each Changemark in the top field of the dialog box. *Using your initials followed by a sequential number will help others to identify the author and order of your Changemarks.*

12. Enter your comment in the bottom field of the dialog box and click the OK  button to save the Changemark.



13. When you are done making Changemarks in a drawing, click the Save As icon at the top left corner of the Brava Viewer. A dialog box will pop up asking you to "Please Input Name." Provide a unique name for this set of Changemarks and click the OK button. *Using your name and the date will help others reading your comments to identify the author and date of each set of Changemarks.*
14. Repeat steps 7 through 13 for each drawing in the set.
15. You can make Changemarks to an existing markup or view others' Changemarks by clicking the Mark-ups icon next to the drawing you want to continue commenting on. The View/Edit Markup screen will appear.



16. Decide which Changemarks you want to view or edit.

    View - To view Changemarks, click the "View" checkbox for each markup name you would like to see. You can view as many or as few Changemarks at the same time as you like.

    Edit - To edit Changemarks, click the "Edit" radio button for the Changemark you want to edit. You can only edit one set of Changemarks at a time.

    Delete - You also have the capability to delete an entire set of Changemarks. *Do not use this feature until you have consulted with the author of those Changemarks .*

17. Once you select the markup you want to view or edit, click the View/Edit button. The drawing and all the selected markups will appear in the Brava Viewer. Here you can use the tool bar at the bottom of the screen to navigate to different areas of the drawing. *You can also click individual Changemarks to see the text of each.*
18. Continue to make Changemarks as before and then click Save As to save your work.

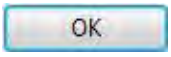
19. Once your review is complete, return to the eForm and scroll to the bottom portion of the page to find your username in the Group Review list. *The Group Title next to your name will be highlighted in red. Note that there may be two scroll bars on the right hand side of this page. Slide the interior scroll bar to find your name at the bottom of the list.*
20. Select the appropriate status in the dropdown menu.

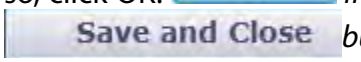
    In Review - You are still in the process of reviewing the drawings. This is the default status. You can click the "Save and Close" button at the bottom of the screen to save your work and return at a later time. You cannot click the "Review Complete" button while your status is in review.

    Corrections Required - You have entered Changemarks for the Consultant to address during the next stage of work.

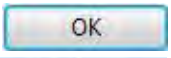
    Approved - You have reviewed the Consultant's drawings and have no comments.

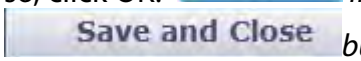
    No Review Required - There are no drawings in this submission that are relevant to your PDCO Team role.
21. After selecting "Corrections Required," "Approved," or "No Review Required" from the dropdown menu, click the "Plan Review And/Or Assignment Complete" checkbox. You can also enter general notes in the text box at the right side of the screen.
22. Click the Complete Review

button at the bottom of the eForm to finish the task and move on. You will be asked if you are sure that you want to complete this task. If so, click OK. 

If you want to leave ePlans and finish this task later, click the Save and Close 

button.
23. During his or her review of the PDCO Team's comments, the Project Manager may request additional information from you. If this happens, you will receive an email notifying you of a new task in your task bar. Click the task and scroll down to your username in the Group Review list.
24. The PM Comments field will display notes from the Project Manager. Respond to the Project Manager in the Reviewer Response field. The PM Comments field and Reviewer Response field show a record of all the text entered into these boxes. *Be sure to enter your most recent comments at the top of the box; adding a date at the beginning of each new comment may help to better organize your comments and responses.*
25. Click the Complete Review

button at the bottom of the eForm to finish the task and move on. You will be asked if you are sure that you want to complete this task. If so, click OK. 

If you want to leave ePlans and finish this task later, click the Save and Close 

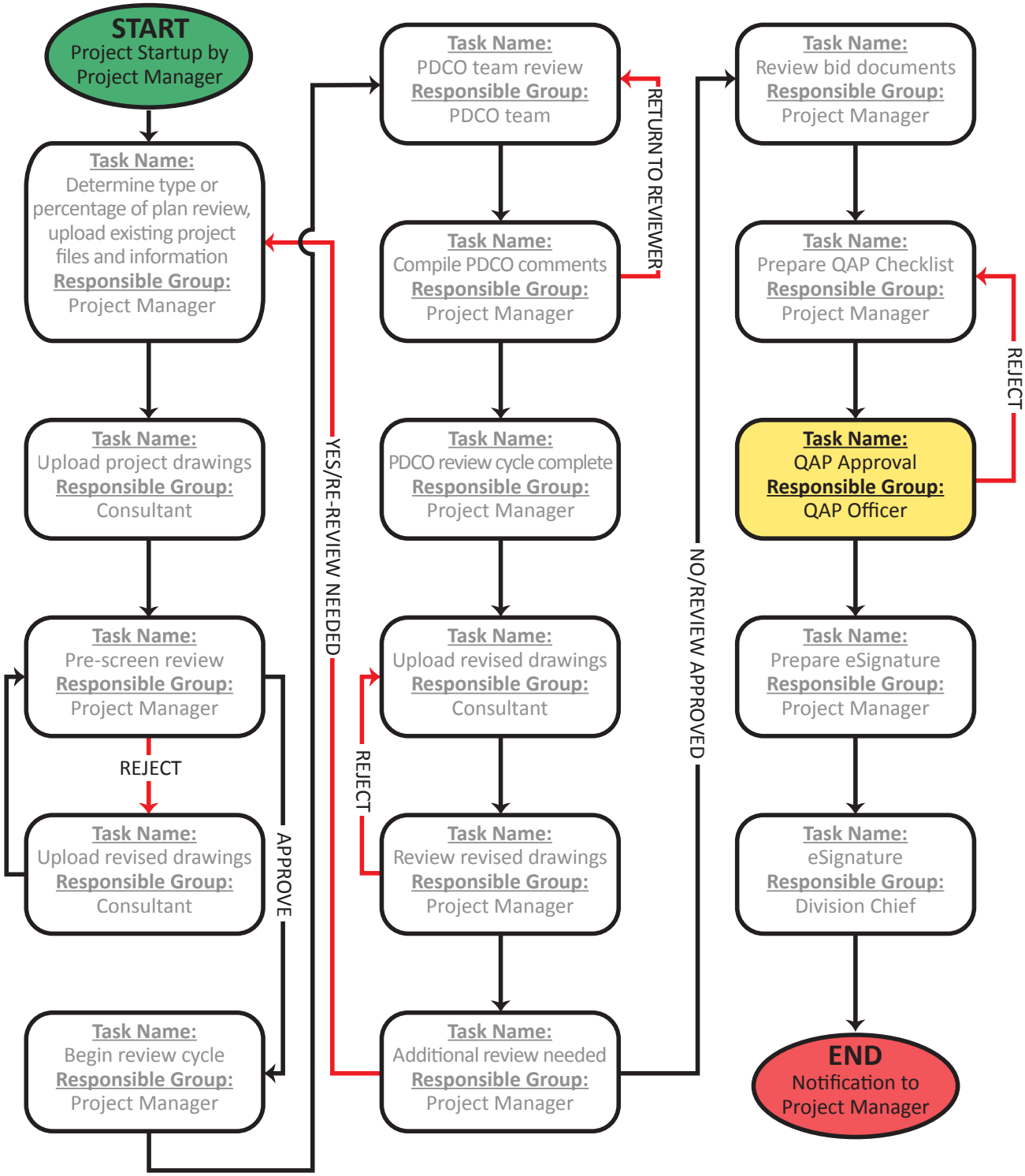
button.
26. Once the Project Manager has resolved all comments with all PDCO Team members, he or she will complete the PDCO Review process and send all comments to the Consultant.

WORKFLOWS:
QAP OFFICER

eplans
MontgomeryPlanning

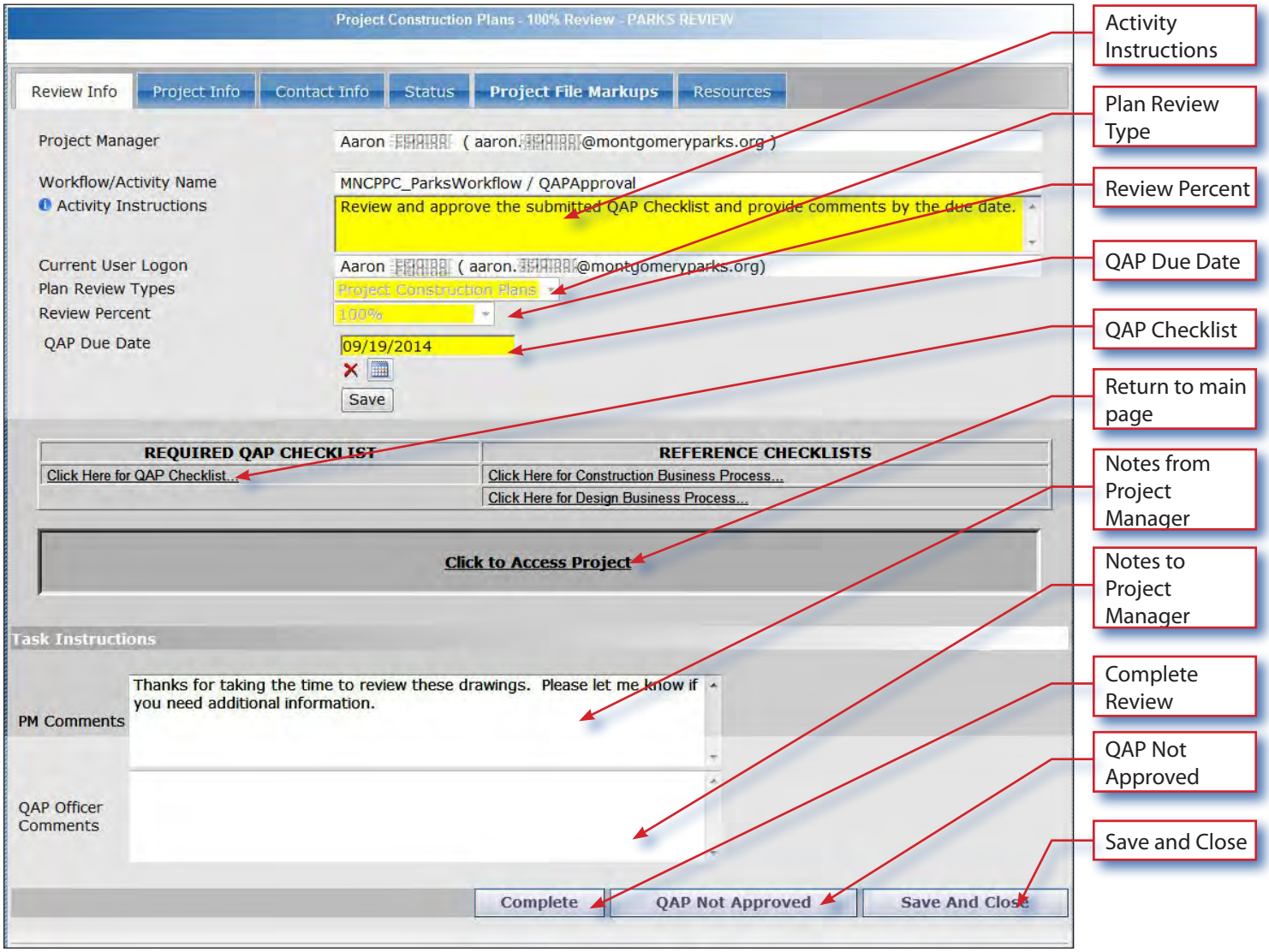
QAP Officer

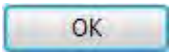
This section describes the QAP Officer's task within the Workflow.



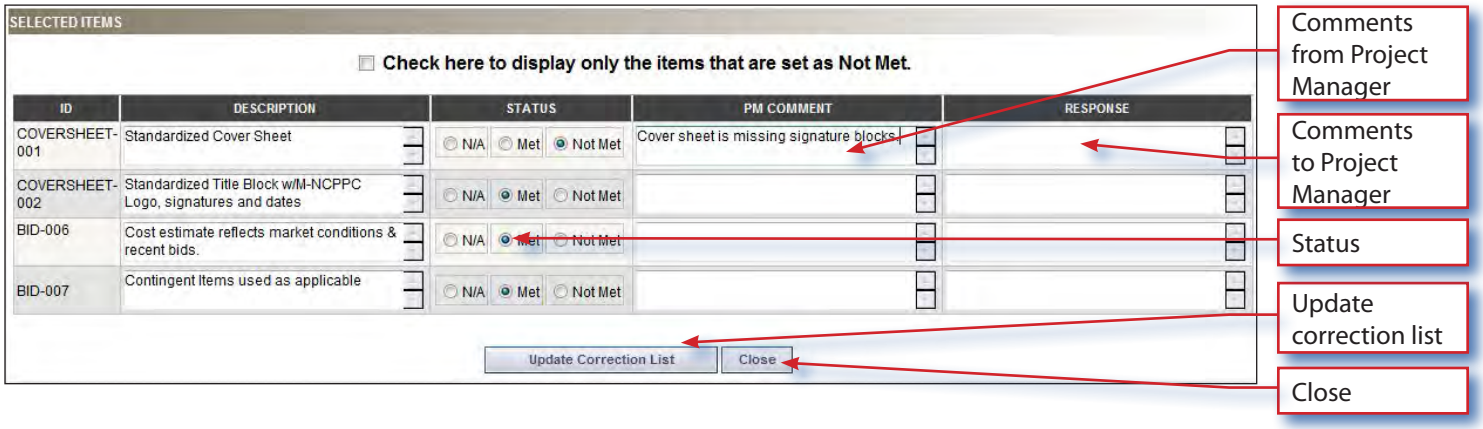
Task Name: QAP Approval

Once a Project Manager has received the 100% revised drawing submission from the Consultant, he or she will initiate the Quality Assurance Program (QAP) approval process. This is one of the final tasks in the Workflow, aimed at ensuring all the necessary components of a complete bid set are present. The QAP Approval is the only task in the Workflow that cannot be skipped.



1. A new task will appear in your Tasks List. Click on the link entitled "QAPApproval."
2. A message will pop up asking if you want to accept the task. Click OK  to accept the task and open the eForm.
3. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. The Project Manager will have requested a date for you to complete the QAP Review in the QAP Due Date field. Additionally, the PM Comments field will include information about the submission you are about to review.

4. Once you have reviewed the information on the eForm, click the link entitled "Click Here for QAP Checklist." This will open the QAP Checklist in a new window.
5. Review the checklist to ensure the Project Manager has met all the requirements. *For any item marked "N/A," the Project Manager should have entered an explanation in the PM Comments box.*
6. You can comment on any item in the checklist by entering a note in the Response field of the checklist.



7. To view the drawing set, navigate back to the project's main page and select the folder to which the drawings are saved. *Do not close the QAP Checklist window while you are viewing the drawings; it may be helpful to toggle back and forth between the two screens. If you closed the eForm for the QAP Checklist, you can get back to it by clicking the task in the Tasks List (see step 1).*
8. Once you finish your review of the checklist, click the Update Correction List button to save the checklist, then click the Close button to return to the eForm. *If you need to stop working and return to this step later, click the Update Correction List button and then the Close button to save your progress. Click the link entitled "Click Here for QAP Checklist" on the eForm to return to this point.*
9. If there are items in the QAP Checklist that need further action from the Project Manager, enter your comments in the QAP Officer Comments field at the bottom of the eForm and click the QAP Not approved button at the bottom of the eForm. This will notify the Project Manager that he or she must make revisions before the QAP Checklist can be approved. This task can be repeated for as many times as it takes until you are comfortable approving the checklist.
10. When all the requirements in the QAP Checklist have been met, click the Complete button to notify the Project Manager. You will be asked if you are sure that you want to complete this task. If so, click OK. *If you want to leave ePlans and finish this task later, click the Save and Close button.*
11. You are now finished with this task, and it will disappear from your Tasks List.

WORKFLOWS:
DIVISION CHIEF

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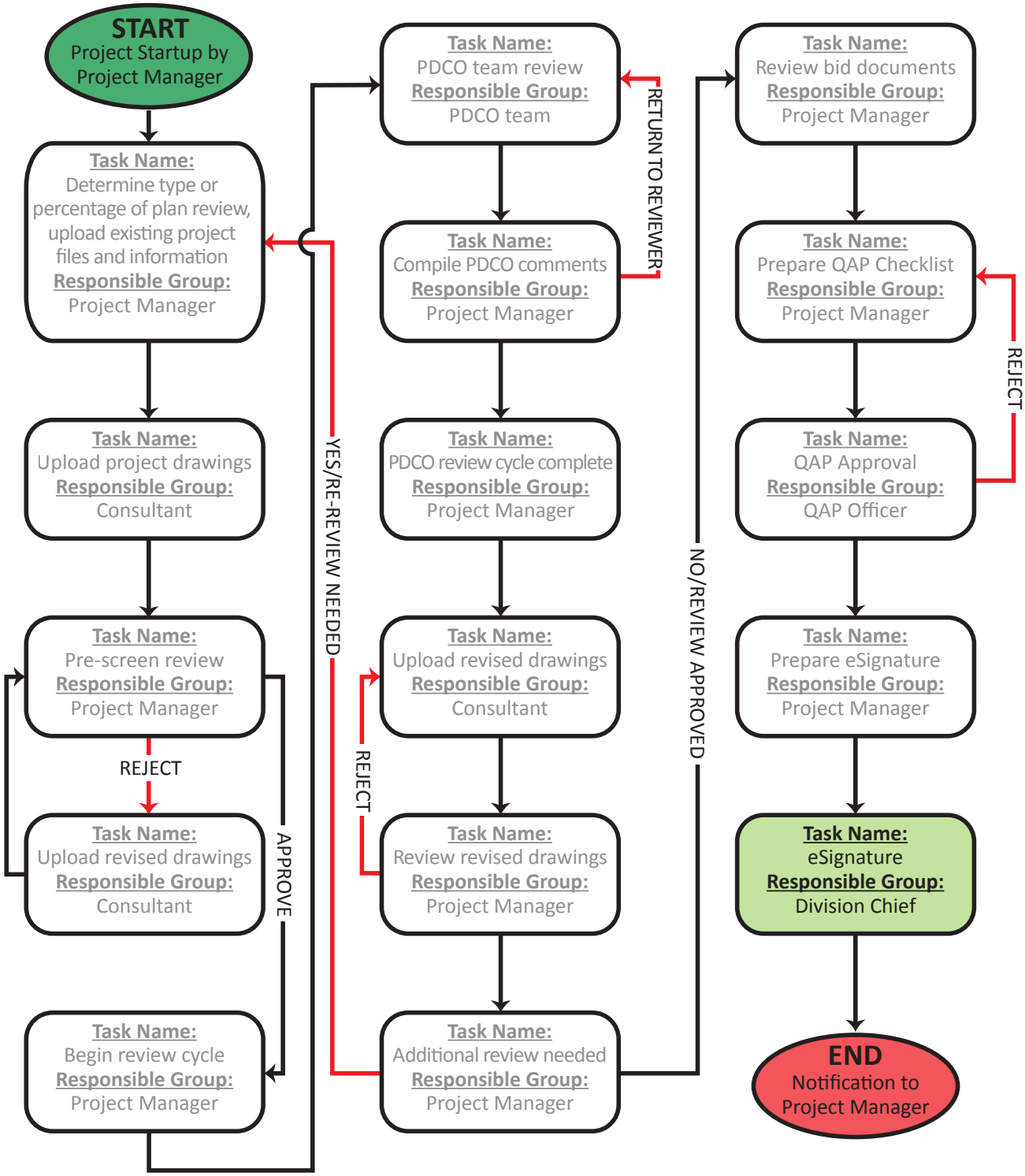
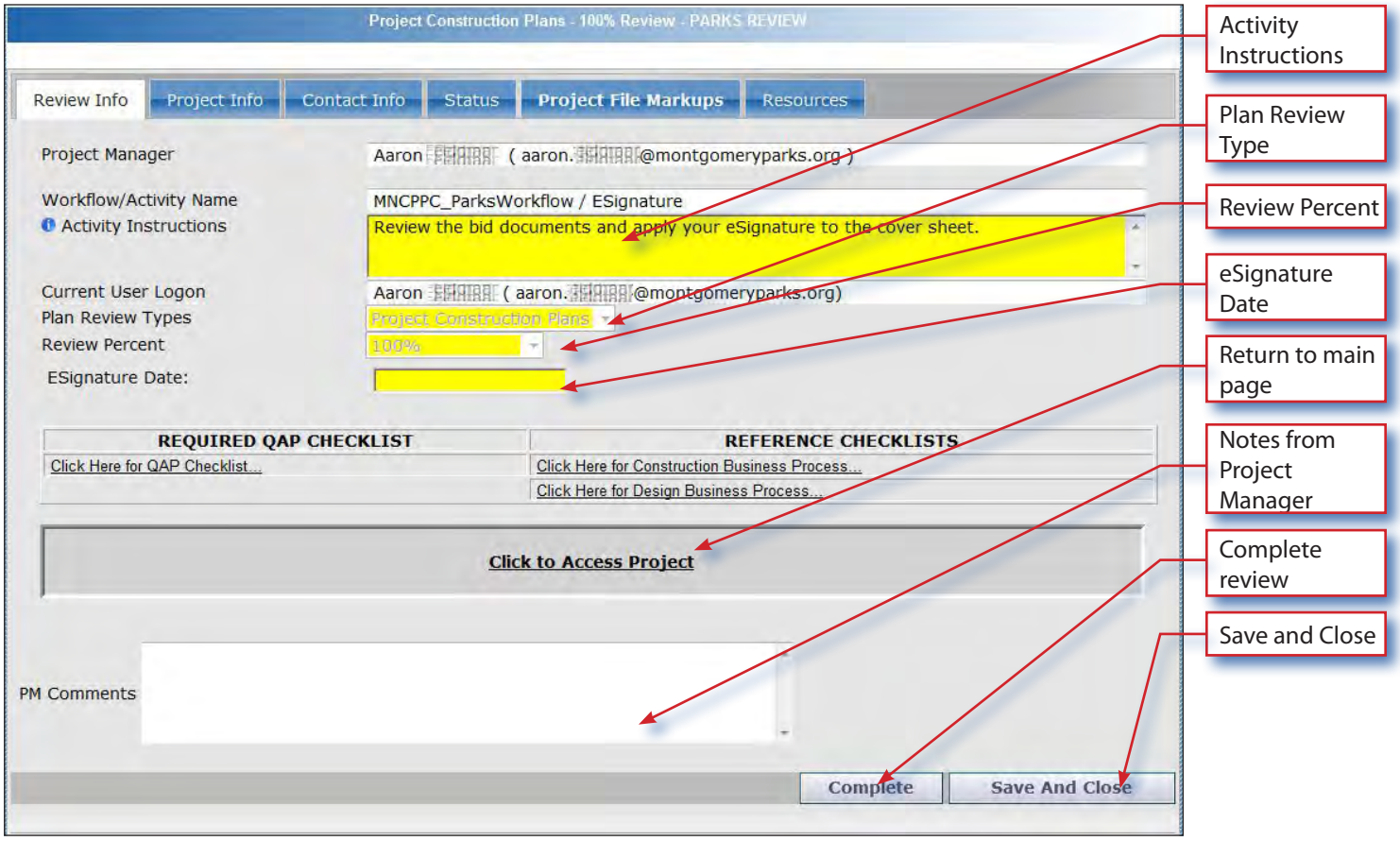
Division Chief

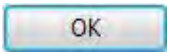
This section describes the Division Chief's task within the Workflow.



Task Name: ESignature

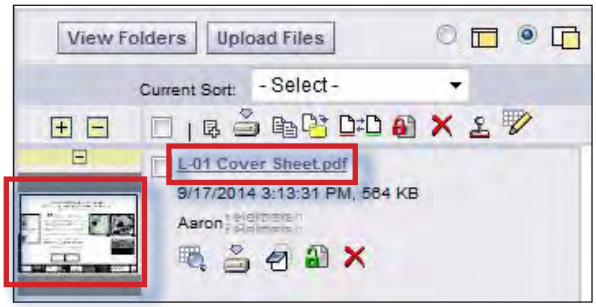
After the QAP Officer determines that the bid set meets the standards for procurement set forth by Montgomery County Parks, the Division Chief must approve the documents by applying his or her eSignature to the cover sheet of the Construction Drawings. An eSignature is simply a copy of one's signature, scanned and saved to a digital file format.

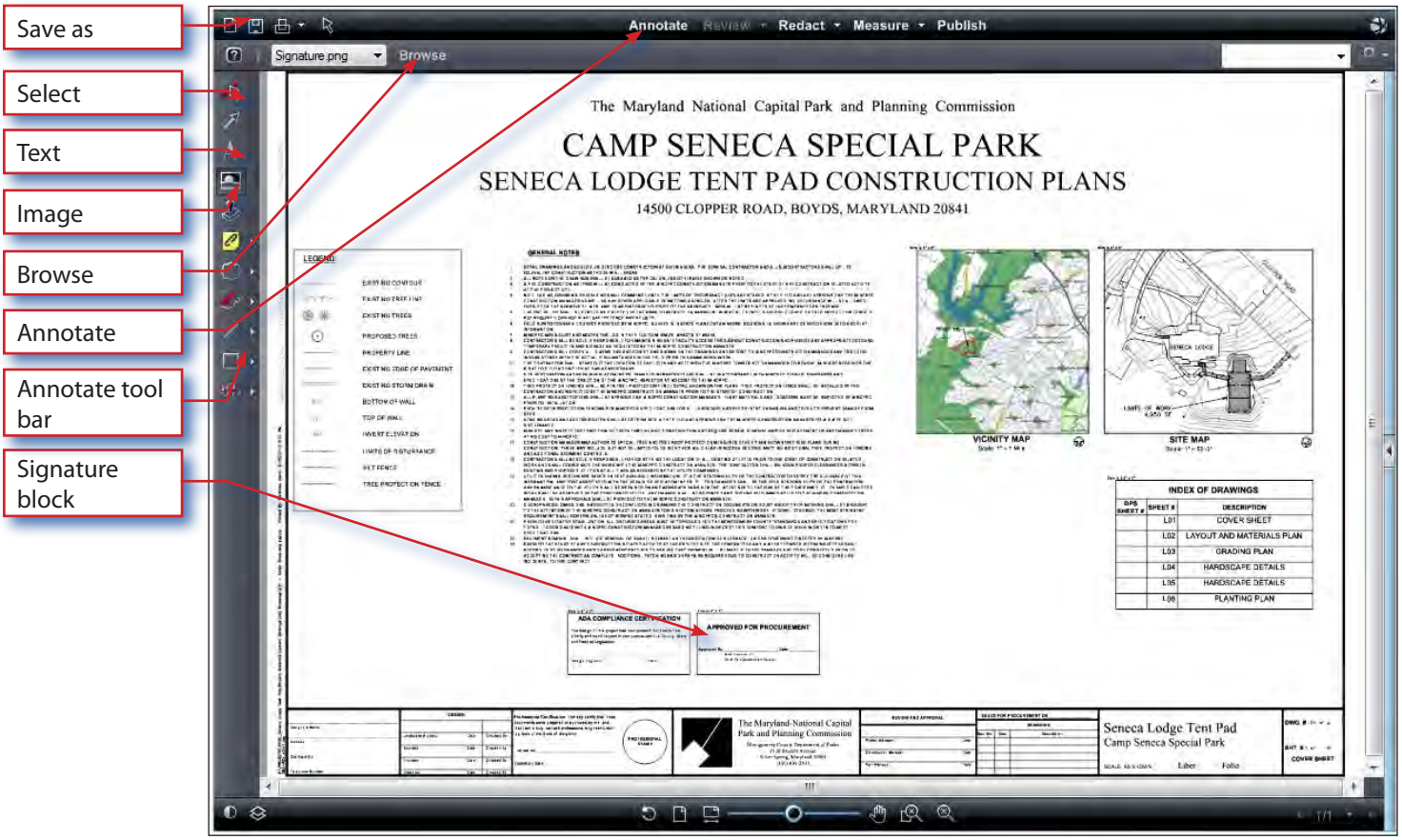


1. Prepare your eSignature file by scanning a copy of your signature and saving it to your computer's hard drive as a Portable Network Graphics (.png) file. *Saving your eSignature to your computer's hard drive ensures that only you have access to that file.*
2. A new task will appear in your Tasks List. Click on the link entitled "ESignature."
3. A message will pop up asking if you want to accept the task. Click OK 

to accept the task and open the eForm.
4. The eForm will appear in a new window and the Activity Instructions will give you more information about what actions are required in this task of the Workflow. The Project Manager will have requested a date for you to apply your eSignature. Additionally, the PM Comments field will include information about the submission you are about to review.
5. To review the Consultant's drawings, click the link entitled "Click to Access Project." This will take you back to the project's main page.

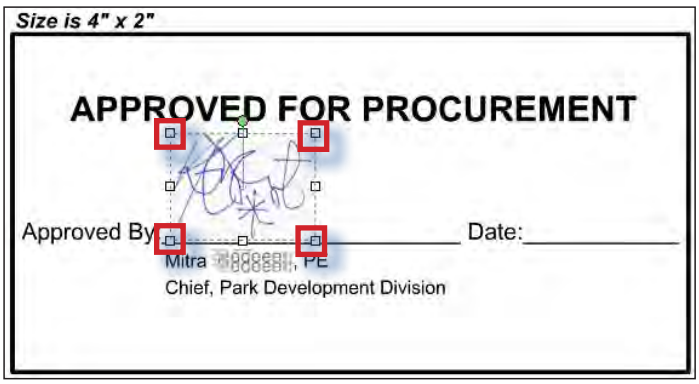
6. The project's File List will appear on the left side of the screen. Click the folder where the drawings are saved. *Unless otherwise directed by the Project Manager, these files will always be in the "Current Submissions" folder.*
7. To view a drawing, click the drawing's name or the thumbnail preview of that drawing. The drawing will appear in the Brava Viewer at the right. If you are satisfied that the bid set is complete, click the thumbnail for the project's cover sheet to open it in the Brava Viewer.





8. Click the Annotate link at the top of the screen to open the Annotate Tool Bar along the left side of the screen.
9. Click the Image button in the Annotate Toolbar at the left side of the screen. A drop down menu will appear immediately above the Annotate Toolbar.

10. Click the Browse Browse button just to the right of that drop down menu to open Windows Explorer.
11. Navigate to the eSignature file on your computer's hard drive and click Open. Open The eSignature file name you just selected should now appear in the drop down menu above the Annotate toolbar. *Until you select a new file or change the eSignature file's location, this file will always appear in the drop down menu after you click the Image icon.*
12. When the Image icon is active, your cursor will turn into a small cross hairs with the image icon just below it. Click your mouse once on the drawing near the signature block to place your eSignature on the drawing.



13. After placing your signature, click the Select icon on the Annotate toolbar to move and scale it to fit into the signature block.
14. Resize your signature to fit on the "Approved By" line by dragging one of the white boxes at the corner of the image. *You can maintain the aspect ratio of your signature by holding the "Shift" key down while resizing the image.*
15. To enter the date of the approval, click the Text A icon in the Annotate toolbar and place a text box on the drawing by clicking the desired location of the text box and typing the date.
16. Resize the text by dragging one of the white boxes at the corner of the image. *You can maintain the aspect ratio by holding the "Shift" key while you resize the image.*
17. Resize the text box (without resizing the text) by dragging one of the two black dots at the top of the text box.
18. Click the Save As icon at the top left corner of the screen. A dialog box will pop up asking you to "Please input name." Type your name and click the OK OK button.
19. Return to the eForm and click the Complete Complete button. The Project Manager will receive an email notification that you have signed the Cover Sheet and the project is ready to go to bid.

OTHER FUNCTIONS

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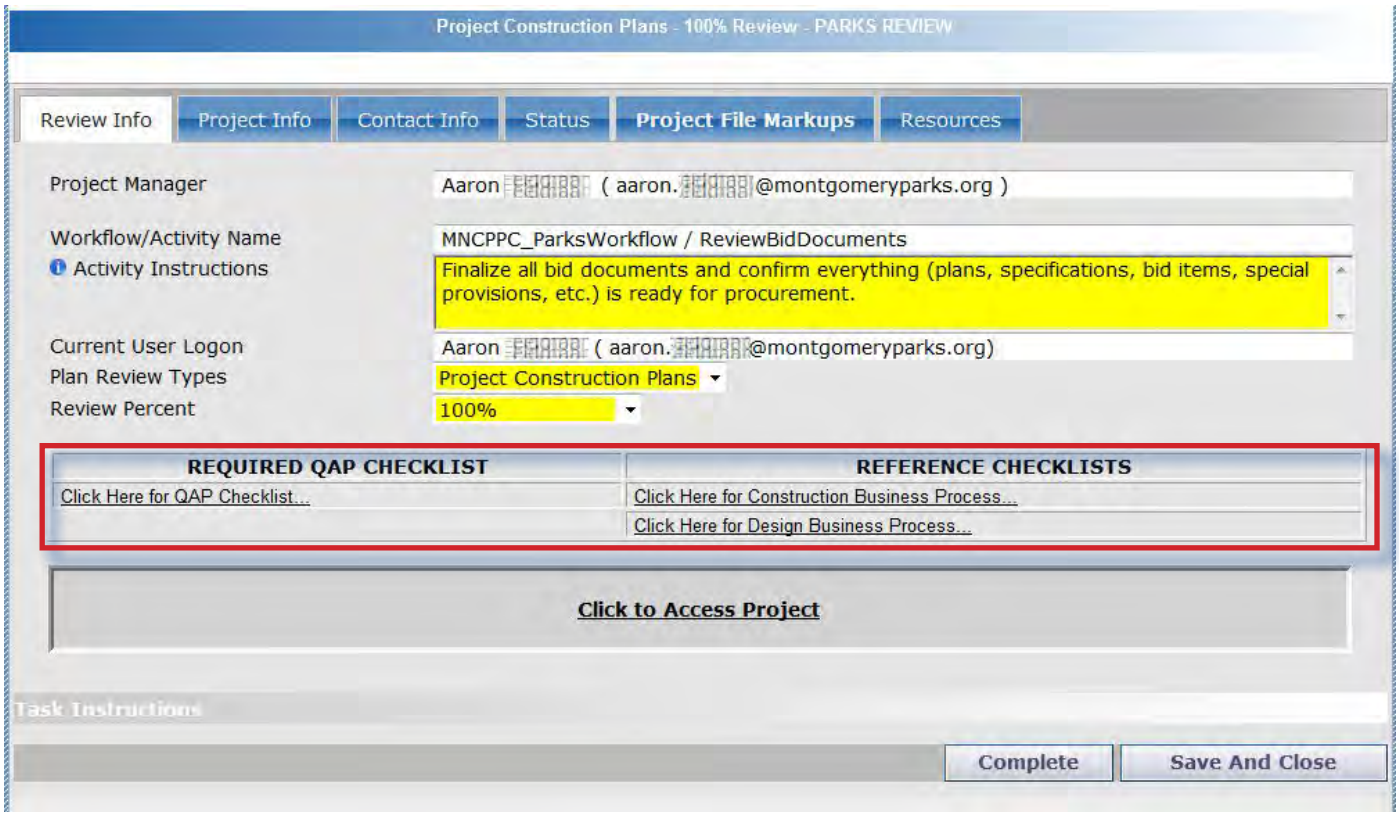
Reference Checklists

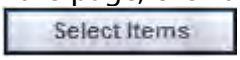
Each eForm contains links to three checklists. These checklists are provided for reference throughout the design review process to ensure all of the requirements of a Park Development project are met. With the exception of the QAP Checklist, these checklists are not a required part of the Workflow.

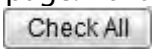


QAP Checklist: This checklist is to be prepared by the Project Manager following the acceptance of the 100% Construction Documents from the Consultant. It is then sent on to the QAP Officer to ensure all the requirements of a set of contract documents are included before the set goes out to bid. This is the only step in the Workflow that cannot be skipped, so the checklist is provided throughout the Workflow to ensure the requirements are being met as the Consultant is developing their drawings.

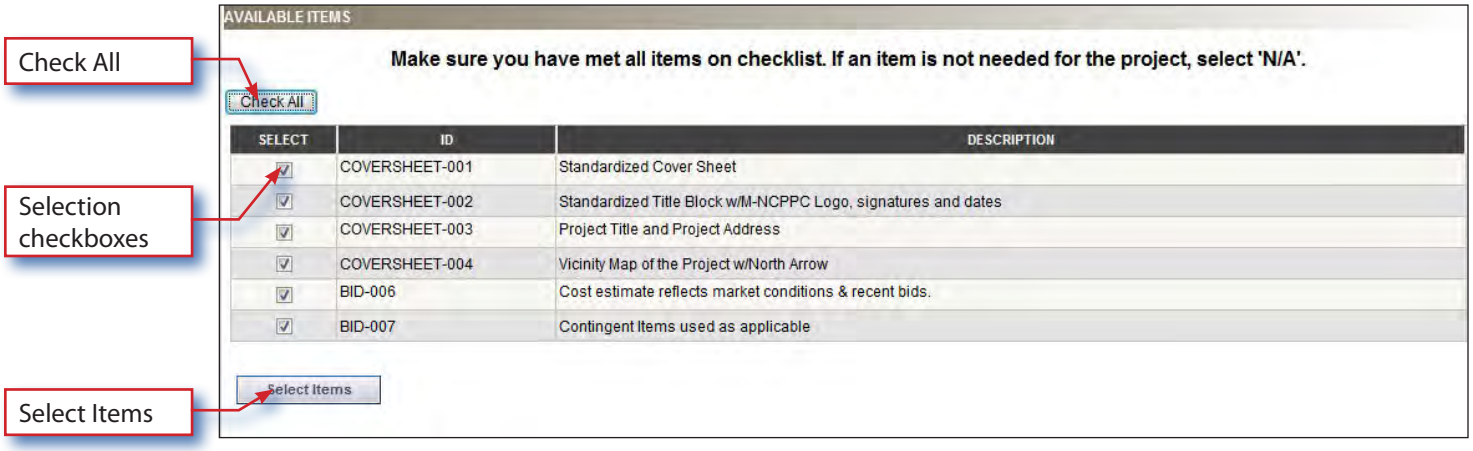
Construction Business Process Checklist: This checklist is used to facilitate the transition from the design phase to the construction phase of a project. The checklist ensures a clear line of communication between the Project Manager, Construction Manager, Construction Inspector and Contractor.

Design Business Process Checklist: This checklist outlines all of the coordination steps within a design process. The Project Manager should use this checklist to ensure that he or she keeps all relevant parties in the loop throughout the process and receives the appropriate approvals to proceed with bidding and construction. The ePlans Workflow was created based on this checklist.

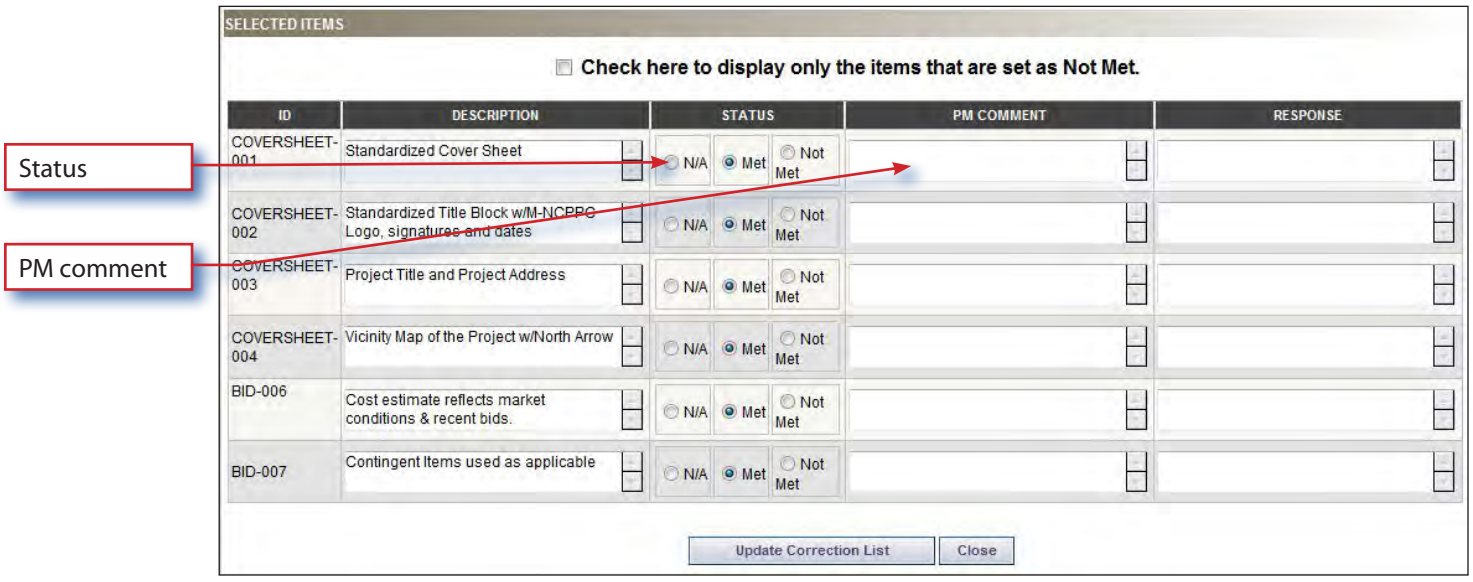
1. Click the link for the checklist you wish to complete. This will open the checklist in a new window.
2. At the top of the page, click the checkbox for all the relevant steps within the process and click the Select Items 

button at the bottom of the page. This will move all the checked items into the form at the bottom of the page. *For the QAP Checklist you will need to select all of the steps. You can do this by clicking the Check All* 

button.

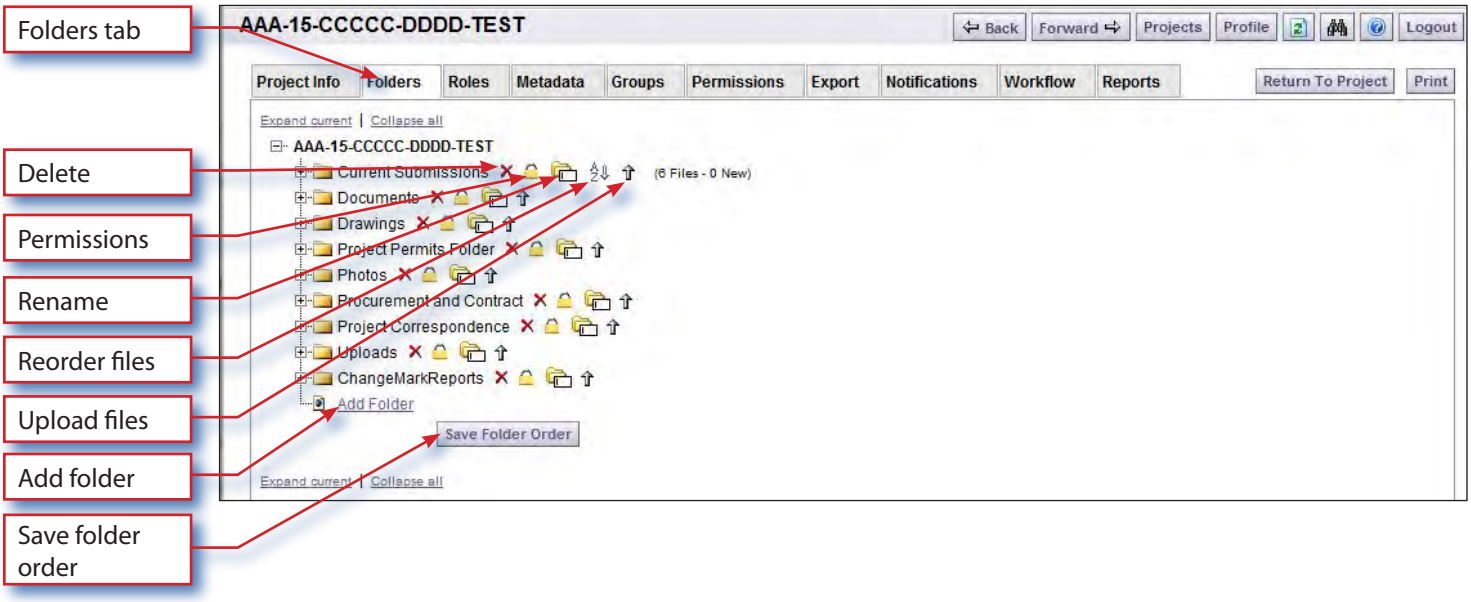


4. As you complete each item on the checklist, you can change the status to "Met" and enter notes in the PM Comment field.
5. You can close this window to return to the eForm.



Folder Management

The ePlans platform is designed to be a secure, online location to store drawings, reports, correspondence and other project-specific documentation. A default file organization tree has been set up within the "PARKS-Project" template. While this folder structure is standard to the Park Development Division, and every effort should be made to adhere to these standards, the folder structure can be modified by the Project Manager at any point during a project.



1. To edit a project's folder structure, click the Edit button in the main toolbar on the project's main page.
2. Modify individual folders by using the icons to the right of the folder's name. *Modify subfolders by clicking the "+" icon to the left of the folder's name.*

   Delete - Delete the folder and all of its contents, including subfolders and their contents.

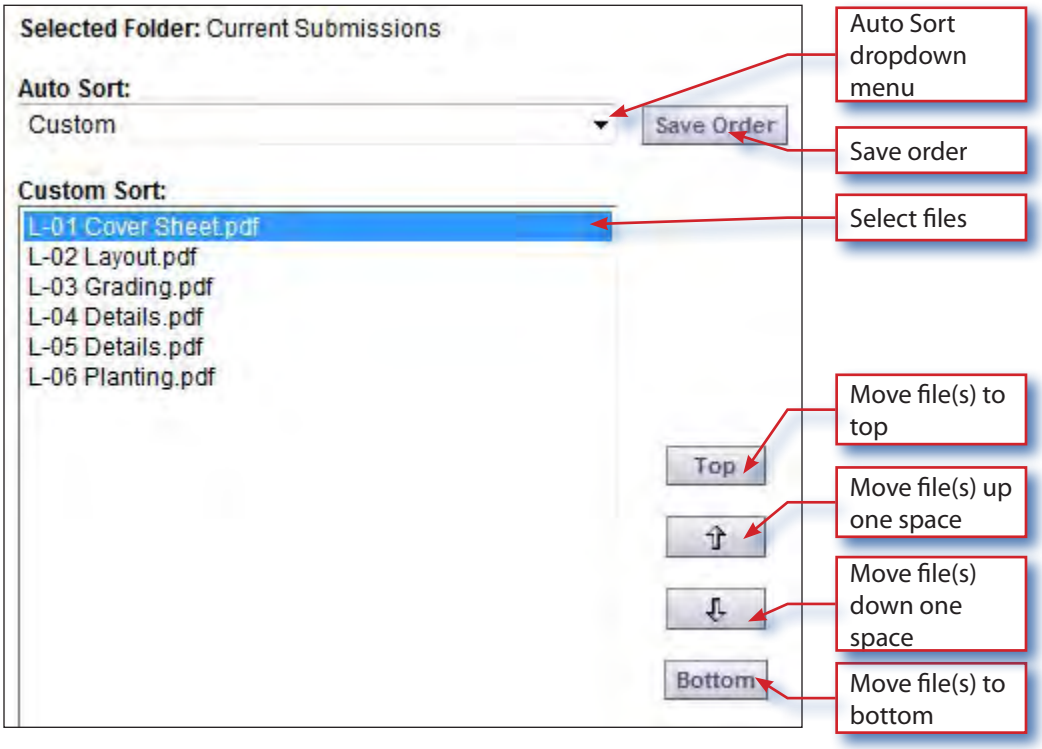
   Permissions - View and modify which users have access to view, modify or download from a particular folder.

   Rename - Change the title of a folder.

   Reorder Files - Change the order in which files appear in the project's file list (additional detail below.)

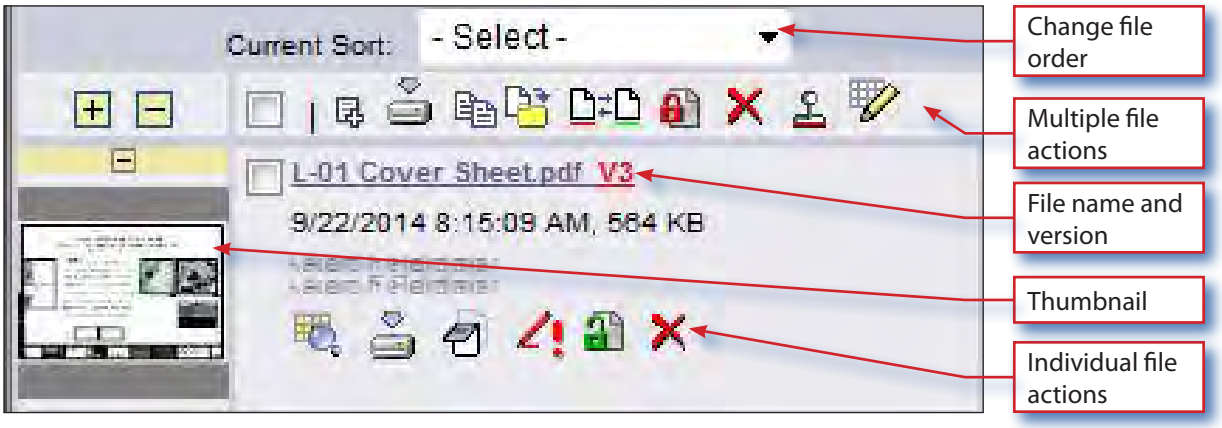
   Upload Files - Upload files to a folder. This process is identical to the upload process outlined in the Project Manager's workflow.
3. To change the order folders are viewed in the project's main page, click on the folder icon you wish to move, and drag it to the location you wish to move it to. Click the Save Folder Order button when you are finished organizing folders.
4. To create a new folder, click the "Add Folder" link at the bottom of the folder structure.

5. During the PDCO Team review process, it may be helpful to change the order in which files appear in the project's file list to reflect the order drawings will ultimately appear in the bid set. Click the Reorder Files icon to bring up a new window. You can use the dropdown menu to automatically sort the files to different parameters, or you can manually create a file order. Click the file (or files) you wish to move and then click one of the buttons at the right of the screen to move the file (or files) to the desired location. When you are finished, click the Save Order button. The next time anyone opens the project's File List, the files will appear in the order you saved.



File Management

Once a phase of a project is complete, you may want to create a record set of Consultant submissions or move older, working files to archive folders. Instead of downloading and uploading files to your computer, this can all be accomplished within the ePlans platform. Project Managers have the ability to move or copy files anywhere within their project and can set permissions for other users to move and copy files.



1. On the left side of the project's main page, navigate to the files you want to modify by clicking the folder in which they are located.
2. You can change the order in which you view the files by selecting from the options in the Current Sort dropdown menu. *See the Folder Management section of this tab to change the default and custom file sort settings.*
3. The top row of icons allows you to modify multiple files at the same time. Click the checkbox next to the files you want to modify or click the checkbox on the left side of the top row to select all files in the folder. *Certain icons in this list do not apply to the Park Development Workflow; their descriptions have been omitted.*

   Download - You can download the selected files to your local hard drive or server. *Remember that any changes made to downloaded files will not appear in ePlans unless you re-upload the modified files.*

   Copy - Create a copy of the selected files in any other folder within the project (additional detail below).

   Move - Move files from one folder to another.

   Compare - Open the Brava Viewer and compare two files to one another. See the "Review Revised Drawings" task in the Project Manager's Workflow for more information on Compare Mode.

   Check Out - Other users cannot modify any drawings that are checked cut. Checking out files ensures that others aren't trying to modify them at the same time you are.

   Delete - Remove selected files from ePlans.

4. The row of icons to the left of each file's thumbnail allows you to modify individual files. *Some of these icons are redundant from the multiple file icons list.*

   View History - View up a file's details, versions and history. If multiple versions of a file exist, you can access the Version Compare tool from this icon. Follow the instructions in the "Review Revised Drawings" task of the Project Manager's Workflow.

   Download - You can download an individual file to your local hard drive or server. R*emember that any changes made to downloaded files will not appear in ePlans unless you re-upload the modified files.*

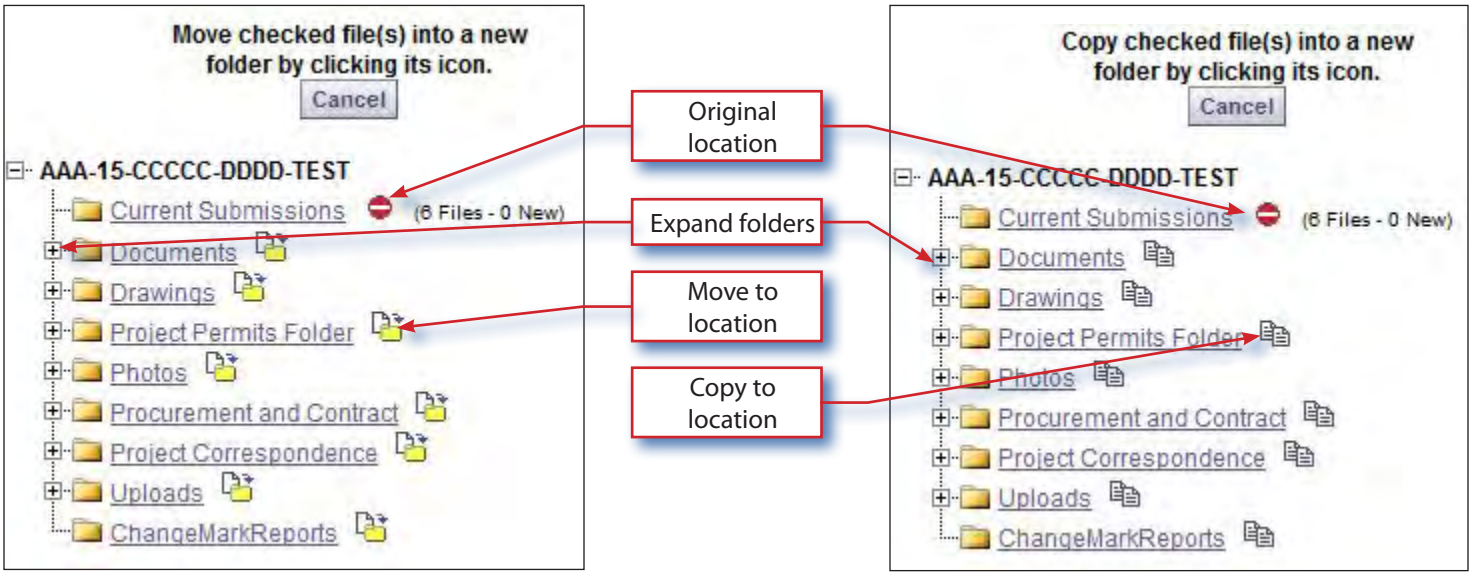
   Topics - Attach notes to a particular drawing for members of a project to see.

   Markups - If markups exist for a drawing, you can use this icon to view or edit them. Follow the instructions in the "Compile PDCO Team Comments" task of the Project Manager's Workflow. This icon will only be visible if Changemarks exist for the current version of a drawing. To view Changemarks on older versions, use the View History icon.

   Check Out - Other users cannot modify any drawings that are checked out. Checking out files ensures that others aren't trying to modify them at the same time you are.

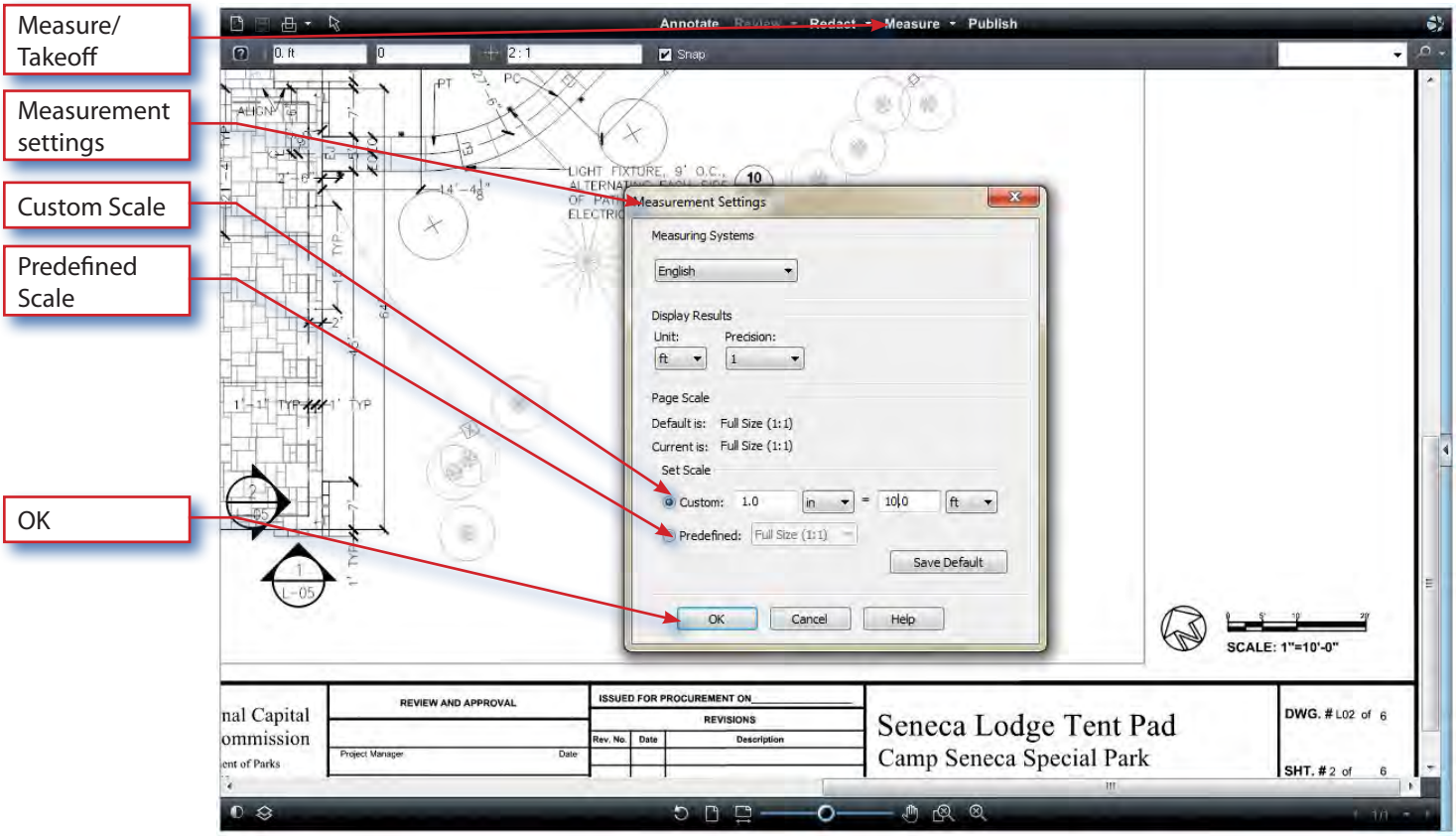
   Delete - Remove the file from ePlans.

5. To move or copy selected files, click the Move or Copy icon at the top of the files list. The files list will be replaced with a new folder tree. Click the "+" icon to expand a folder and view its subfolders. Navigate to the folder to which you wish to move the file and click the Move or Copy icon next to that folder's name. A message will appear indicating that the action was successful.

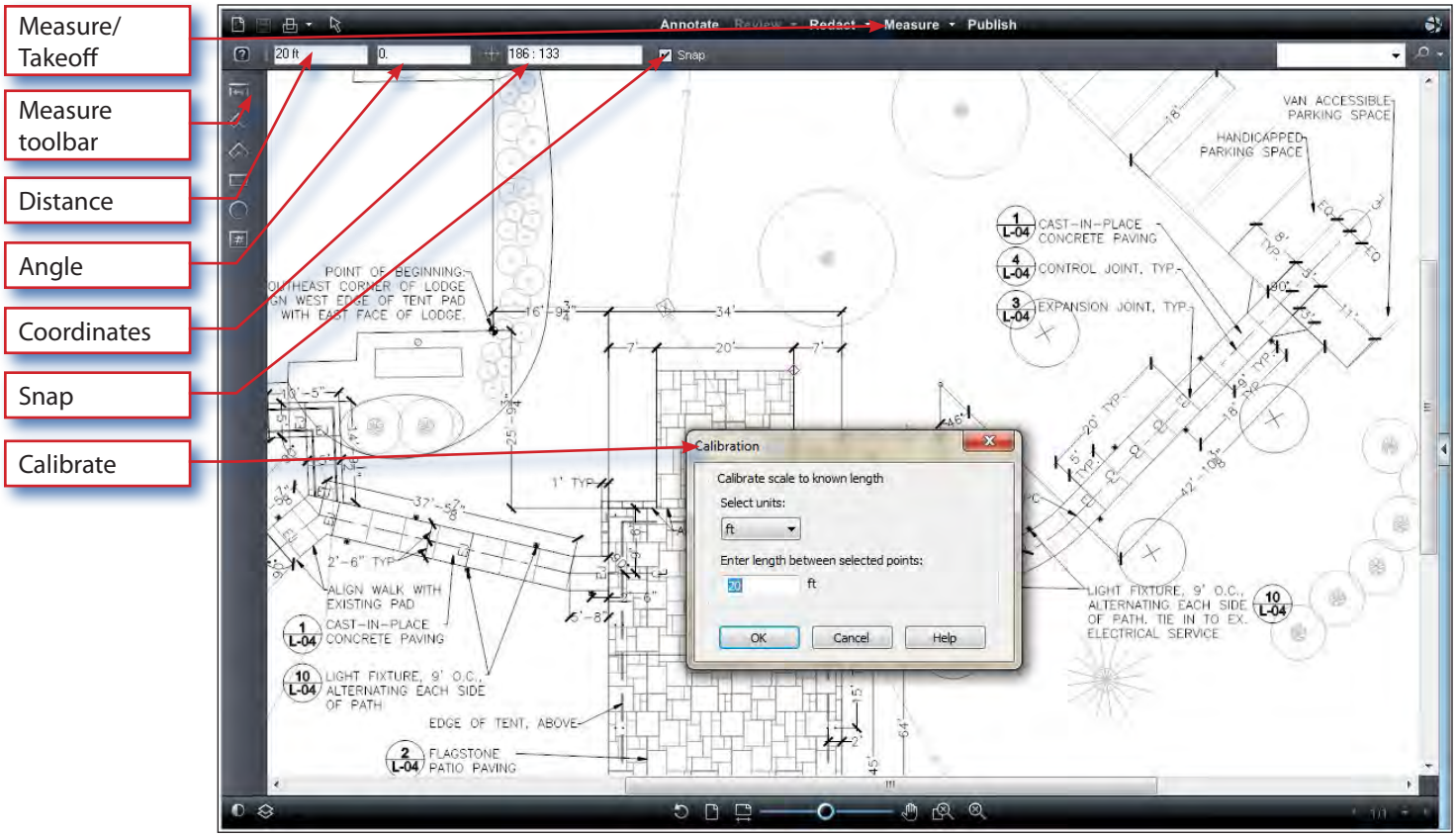


Measure Tools

The Brava Viewer allows users to take accurate measurements from scaled drawings right on the computer screen. The measure tool can be calibrated to any drawing scale, automatically calculating real-world distances from scaled drawings.



1. Open a drawing in the Brava Viewer by clicking its thumbnail in the project's file list.
2. Click the small arrow button to the right of the Measure Measure or Takeoff link at the top of the Brava Viewer.
3. If you know the drawing's scale, select "Settings..." from the dropdown menu to open the Measurement Settings window. Enter the drawing's scale in the "Custom" field or select from the "Predefined" dropdown menu, and then click the OK OK button.
4. If you are not sure of the drawing's scale, zoom to an element on the drawing with a known dimension and select "Calibrate..." from the Measure or Takeoff dropdown menu. *If no graphic scale exists, parking spaces, sidewalks and doorways all make good elements to calibrate your drawings from.* Make sure the "Snap" checkbox is checked, and click once on the beginning point and end point of the element you want to calibrate your drawing from. If you did this correctly, the Calibration window will open. Select the units you wish to display, type in the length of the element you just traced and click the OK OK button.



5. Click the Measure **Measure** button at the top of the Brava Viewer to open the Measure toolbar at the left side of the viewer.

   Measure Line - Calculate the distance and angle between two points.

   Measure Polyline - Calculate the combined length of multiple lines.

   Measure Polygon - Calculate the overall length and area of a closed polygon.

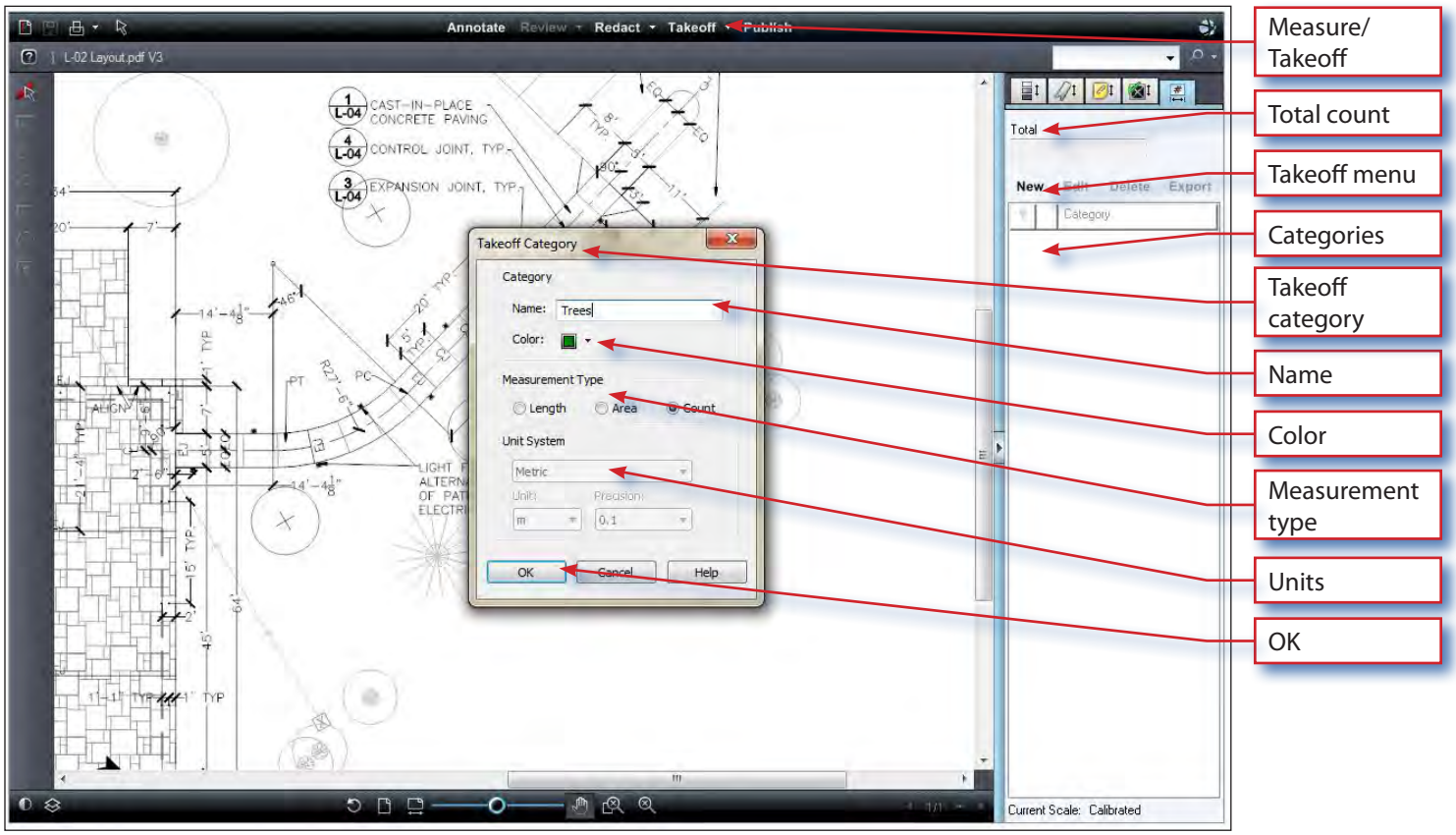
   Measure Rectangle - Calculate the width, height and area of a rectangle.

   Measure Circle - Calculate the radius, circumference and area of a circle.

   Measure Count - Place check marks ✓ on a drawing to record what areas have already been measured.

Takeoff Tools

The Brava Viewer has the ability to count the number, length or area of several different elements at once, keeping individual tallies for types of elements. This feature is particularly useful when creating cost estimates, determining quantities of materials to order or verifying whether proposed work falls within required limits.



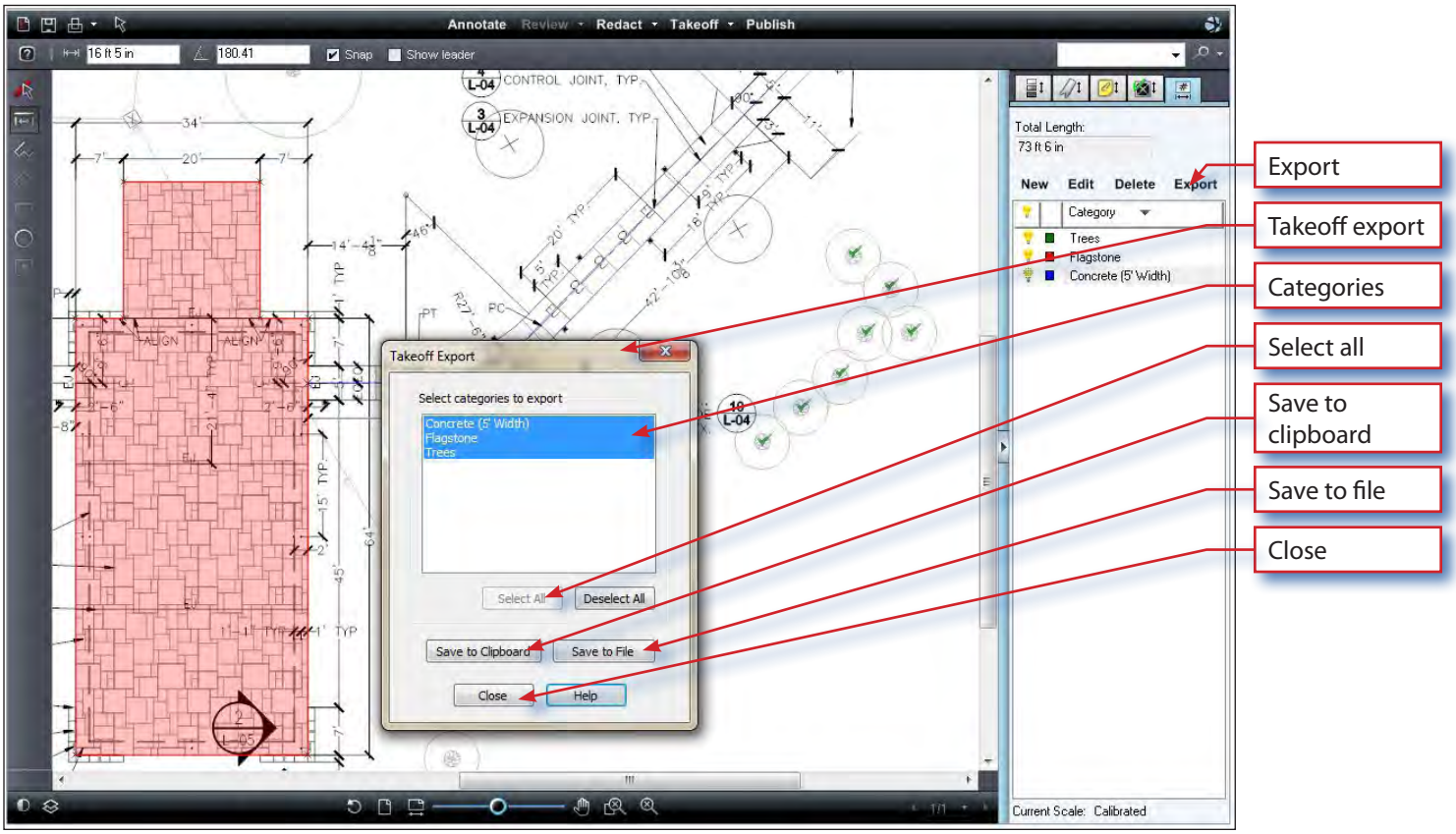
1. Open a drawing in the Brava Viewer by clicking its thumbnail in the project's file list.
2. Calibrate the drawing by following steps 2 through 4 in the Measure Tools section.
3. Click the small arrow button to the right of the Measure button at the top of the screen and select Takeoff from the dropdown menu. This will open the Takeoff menu at the right of the screen.
4. Click "New" in the Takeoff menu to open the Takeoff Category window.
5. Enter the type of element you want to count in the "Name" field.
6. Select a color for the category. *You may want to differentiate between elements by assigning a different color to each.*
7. Select the measurement type you want to use. The appropriate buttons in the Measure toolbar will become active, depending on which measurement type you select.
8. Click the "OK" button.

9. Repeat steps 4 through 8 for each category of element you want to count.
10. You can save takeoffs as a spreadsheet or text file by clicking the Export button in the Takeoff menu.
11. Select the categories you would like to export. *Hold the "Ctrl" key down and click to select multiple categories, or click the "Select All" button to export all categories.*
12. Determine the format to which you want to save your data.

    Save to Clipboard - This will copy each category and quantity as a string of text, with each value separated by a comma. You can paste this information directly into the text of an Email or a word processing document.

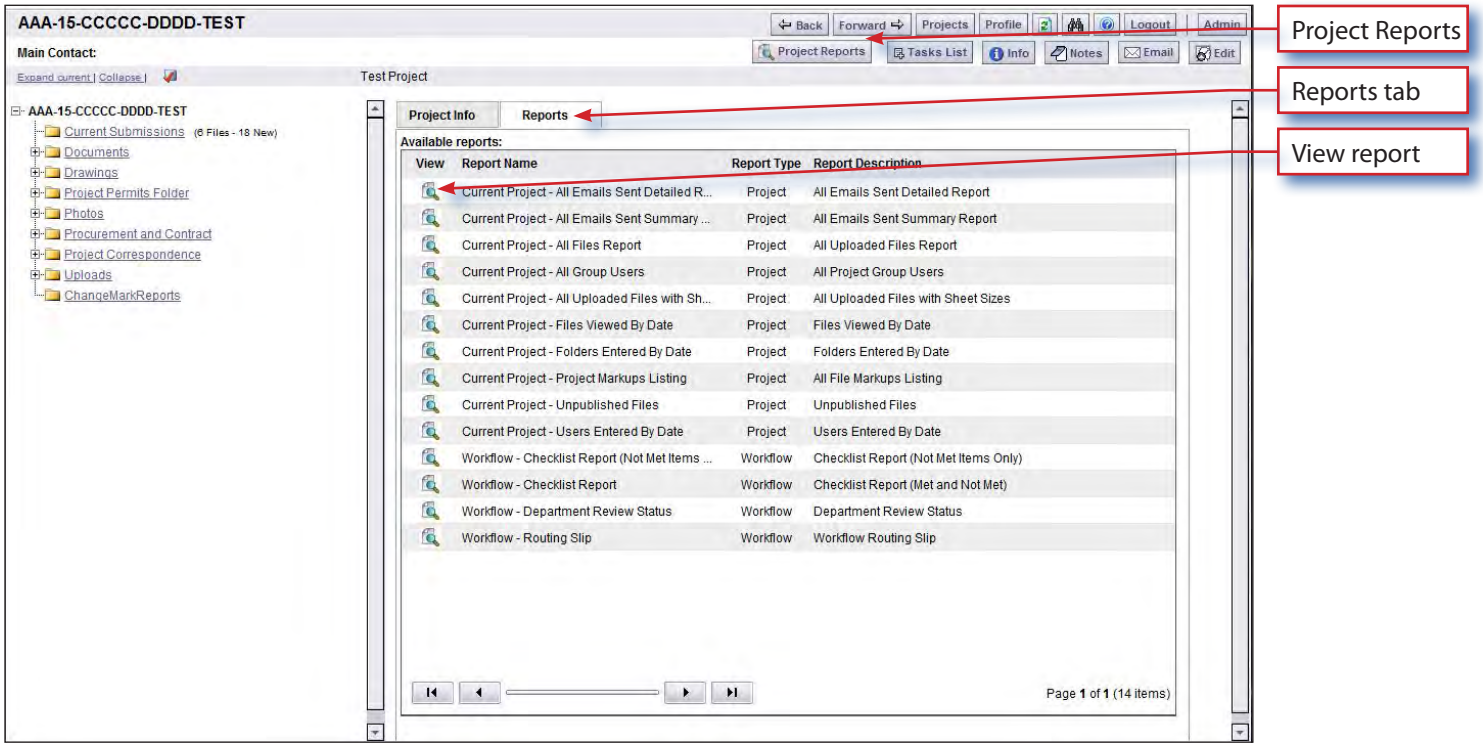
    Save to File - This will save a comma separated value (.csv) file that can be opened in Microsoft Excel or other spreadsheet program.

12. Once you have finished exporting the data, click the Close button on the Takeoff Export window.
13. To save all the takeoffs you have calculated as a layer on the drawing, click the Save As button at the top left corner of the Brava Viewer. Enter the name you wish to save this layer as and click OK.
14. To return to a Takeoff layer you previously saved, open the drawing in the Brava Viewer and click the Review button at the top of the viewer. Select the layer name you want to view and click OK. Click the Takeoff tab at the top of the Takeoff menu.



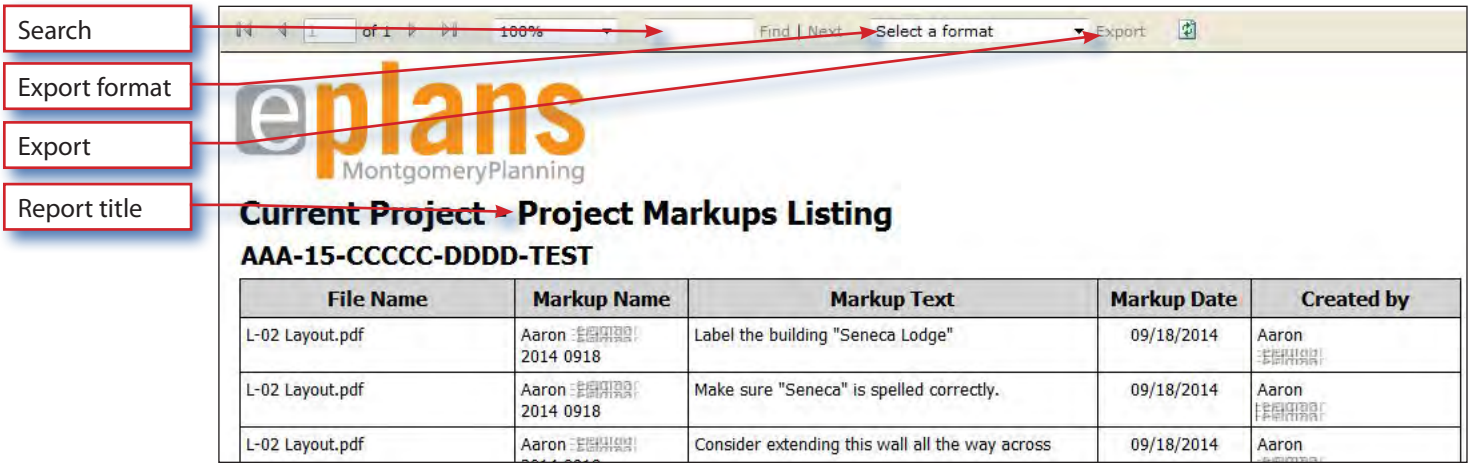
Reporting

Any time a user performs an action in ePlans, a record of that action is saved to the ePlans server. Using this information, ePlans users can generate a number of different reports to find out various activities occurring in their projects. Reports are available through the project's main page.



1. For reports about a project, go to the project's Main Page. From here you can access a project's reports by clicking the Project Reports button on the main toolbar or by clicking the Reports tab next to the Project Info tab.

2. Find the report you want to generate and click the View Report icon. The report will open in a new window.

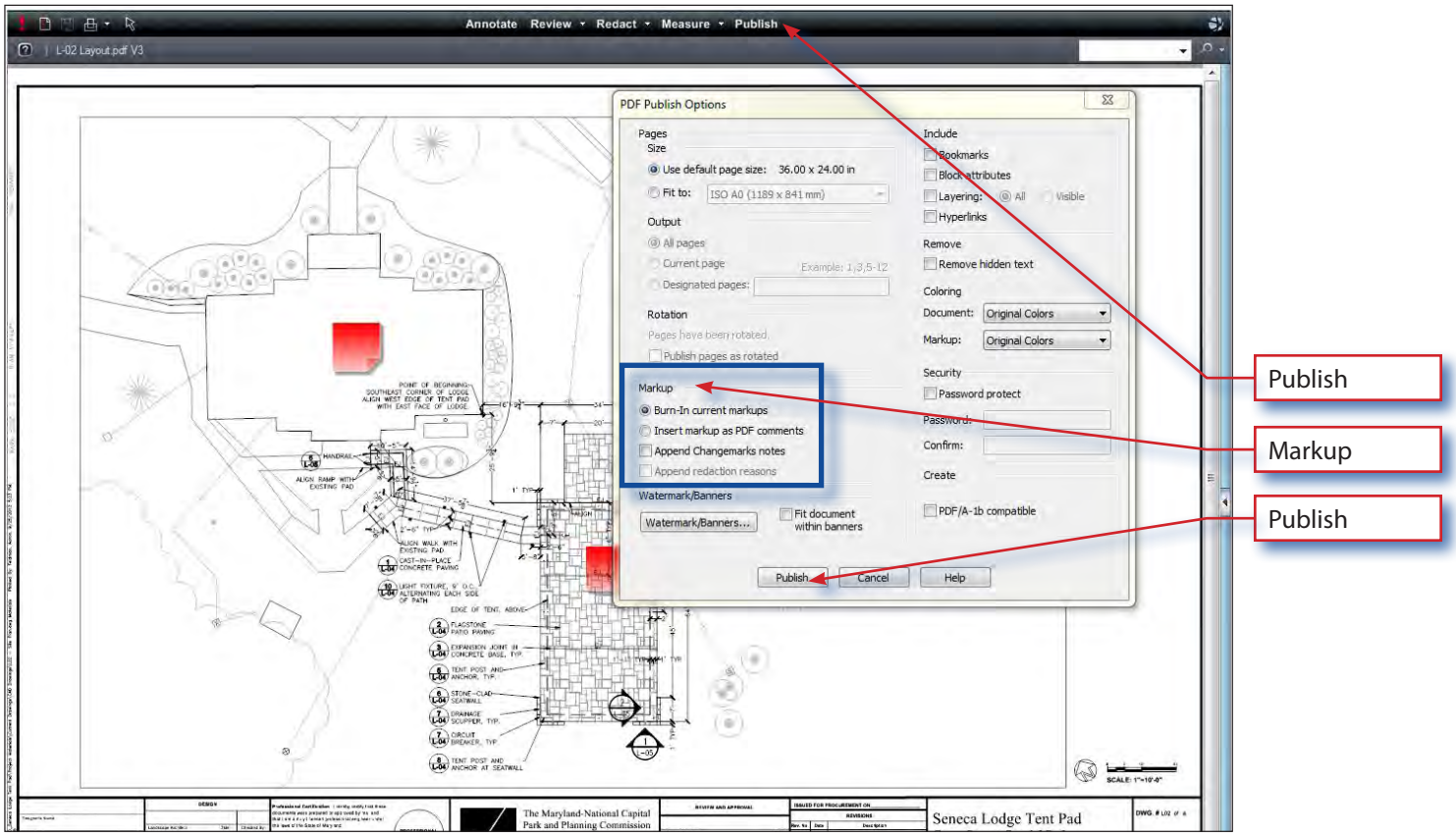


3. You can save the report to a number of different file types, depending on how you plan to use the data. Click the dropdown menu next to the Export **Export** button at the top of the report screen to select your preferred file type, and then click the Export button.
4. A window will pop up at the bottom of your screen asking if you want to open or save the file. Click the button for whichever action you wish to perform. *You can select the destination you wish to save a file to by clicking the arrow next to the "Save" button and selecting "Save As."*

Do you want to open or save Current Project - All Files Report.xlsx from deveplans.montgomeryplanning.org?
Open
Save
Cancel

Publishing Changemarks

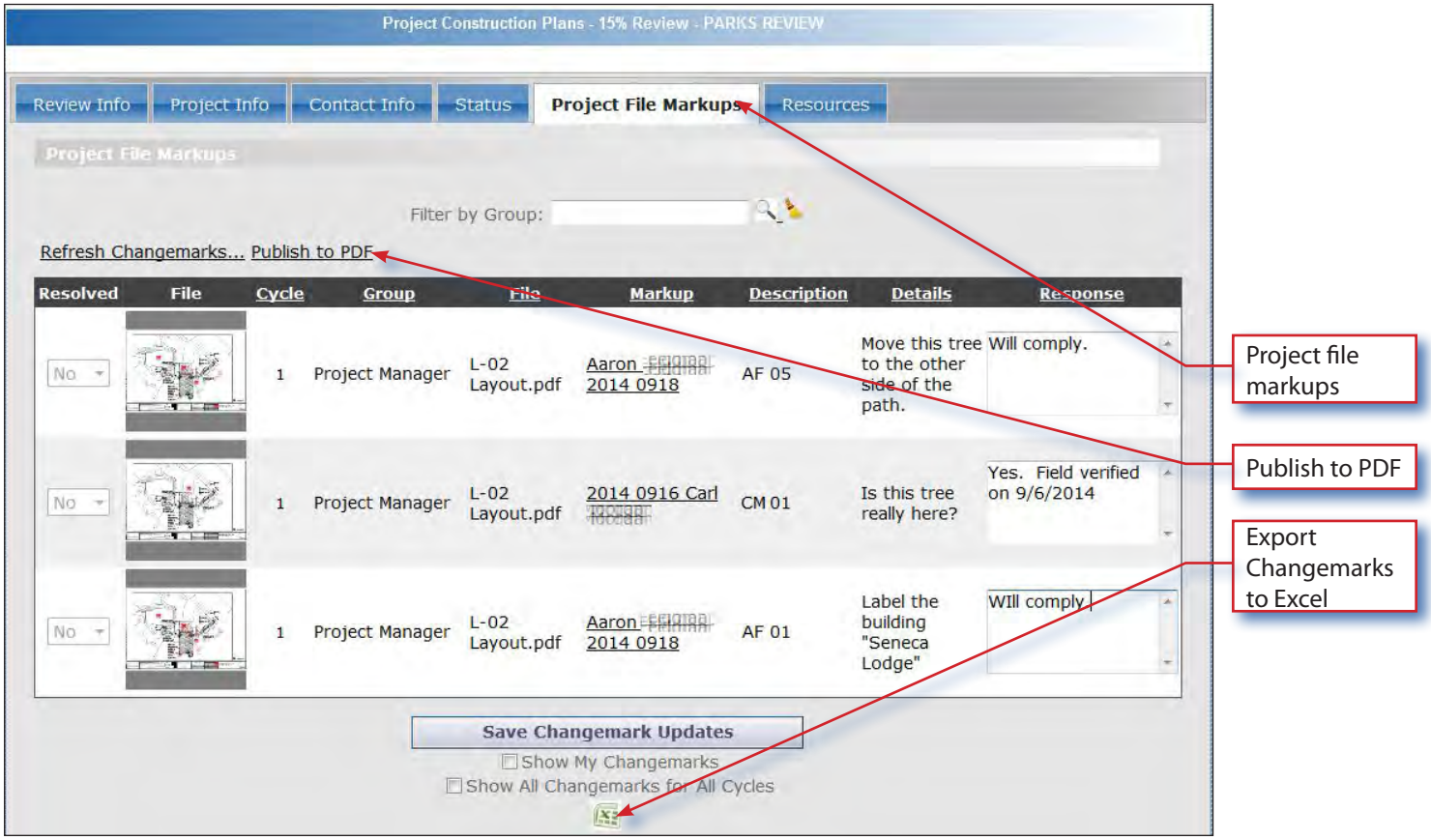
After each PDCO Team Review, it is a good idea to save a record copy of all the Changemarks made on the Consultant's drawings. ePlans allows you to embed the Changemarks into each drawing, or to save a comprehensive list of every Changemark made for an entire project.



1. To save a copy of a drawing with Changemarks embedded into it, navigate to the folder list on the left side of the project's main page, and find the drawing you wish to publish. Click the Markups icon for that drawing to open the View/Edit Markup screen.
2. Click the "View" checkbox next to the Changemarks you want to publish and click the View/Edit button to open the Brava Viewer.
3. Click Publish at the top of the screen and select "Publish to PDF" to open the PDF Publish Options dialog box.
4. Determine if how you would like the Changemarks to appear in the published PDF:

   Burn-In current markups - This setting will insert all the open Changemarks as a layer in the drawing. You cannot edit Changemarks using this feature.

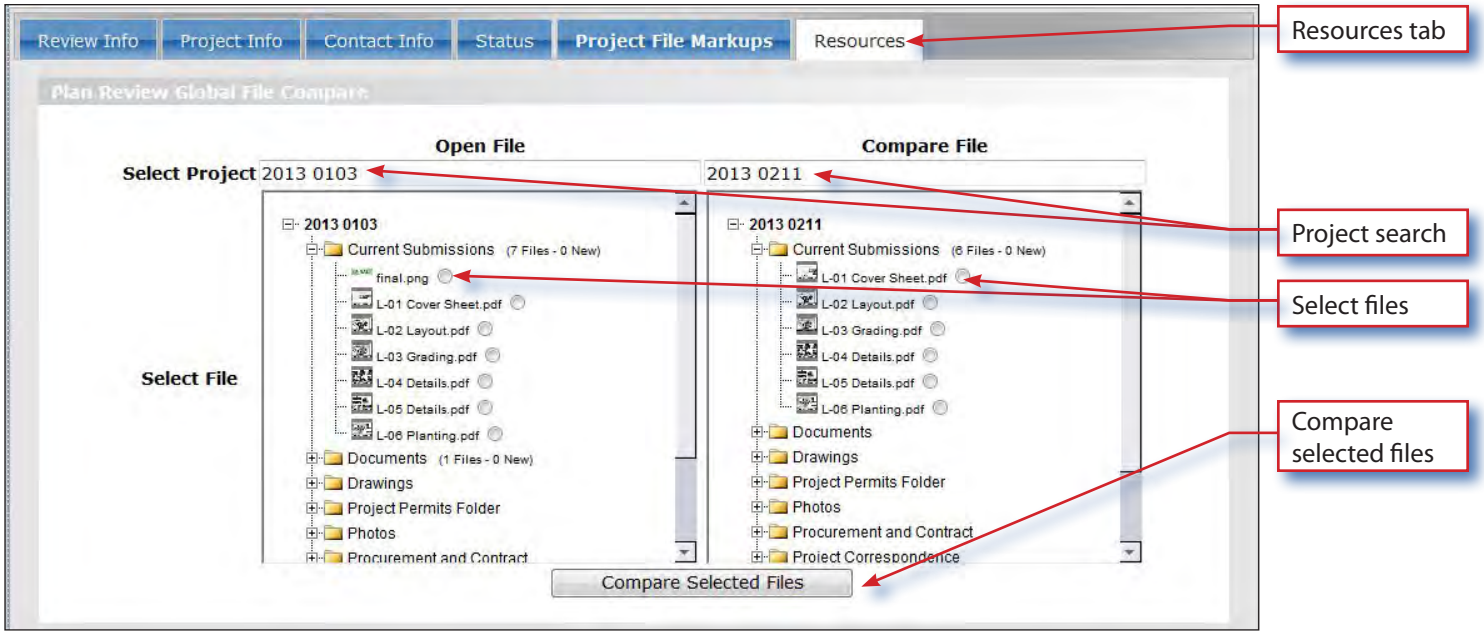
   Insert markup as PDF comments - This setting converts all the file's Changemarks to PDF comments, allowing you to manipulate them as if they were comments created in Adobe Acrobat.
5. Click the "Publish" button at the bottom of the "Publish to PDF" dialog box to save the file to your local or network drive, or to attach it to an email.

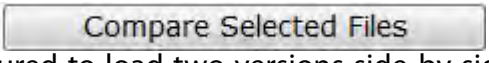


6. A comprehensive list of all the Changemarks for an entire project can be saved through the project's eForm. Navigate to the project's task list and click on any active task to open the eForm. Click the Project File Markups tab at the top of the eForm.
7. To create a PDF of all the project's comments, click the "Publish to PDF" link at the top of the Changemarks list. The file will be saved to the ChangeMarkReports folder on the project's folder list.
8. To create an Excel spreadsheet of the Changemarks, click the Microsoft Excel icon at the bottom of the Changemarks list. A window will pop up at the bottom of your screen asking if you want to open or save the file. Click the button for whichever action you wish to perform. *You can select the destination you wish to save a file to by clicking the arrow next to the "Save" button and selecting "Save As."*

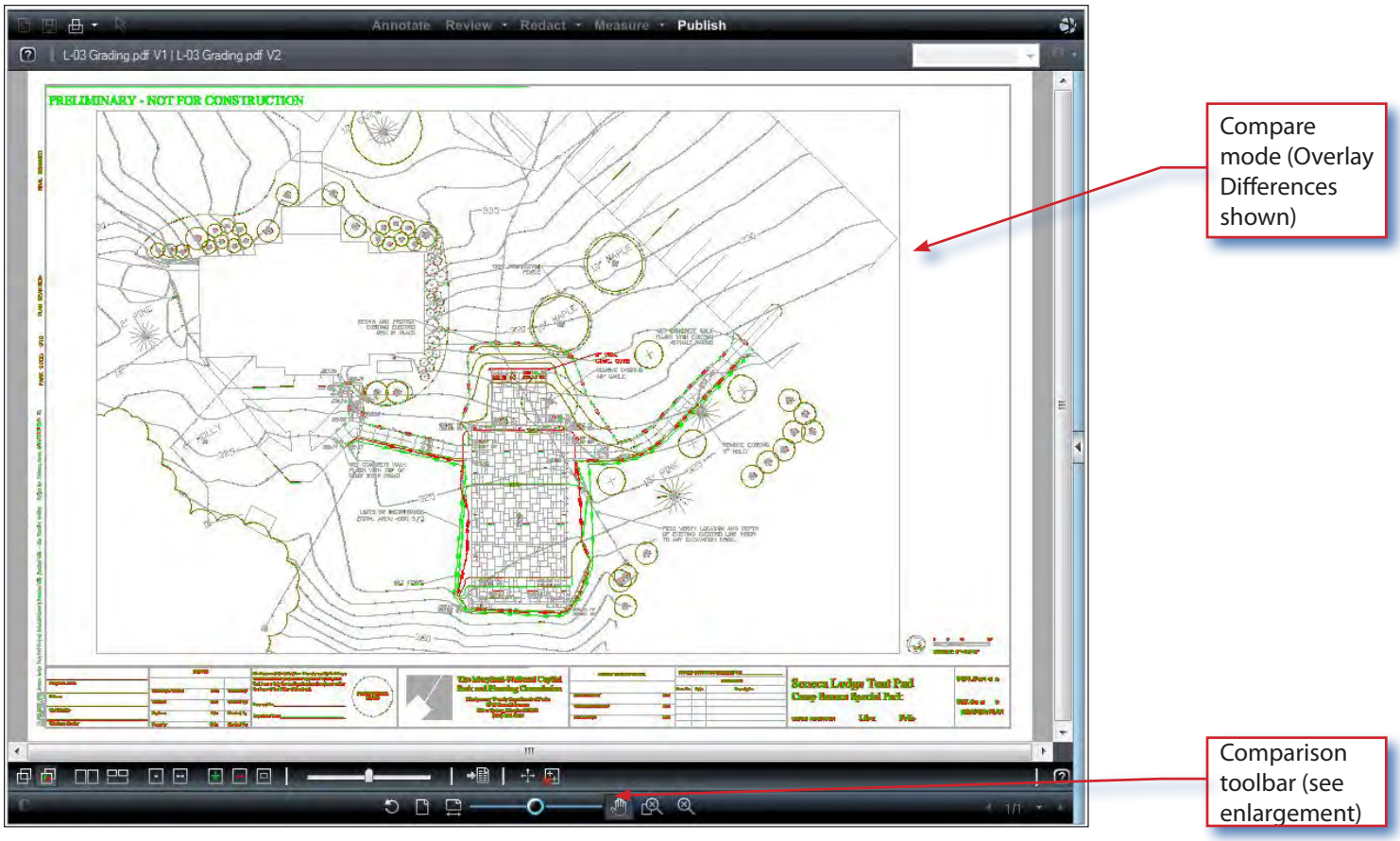
Global Compare

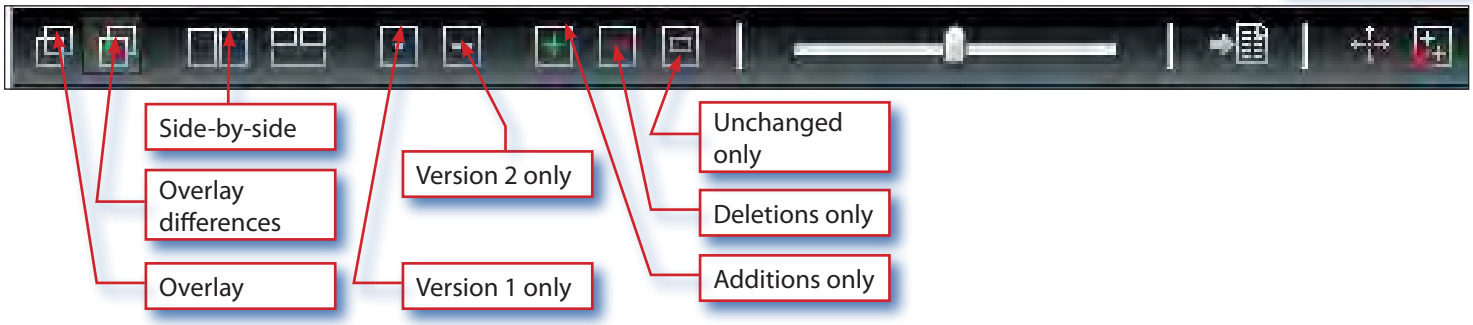
The Global File Compare tool expands the capabilities of the Brava viewer's "Compare" tool such that users can compare any two documents, regardless of the project or folder they are housed in. The only requirements are that a user must already have access to the project in which he or she wants to view documents, and the user must also have an active task within a Workflow.



1. Navigate to a project where you have an active task and click on that task to open the eForm. *It does not matter which project you use to get into an eForm; you will have the opportunity to select the projects where your files are housed in a later step.*
2. Click the Resources tab at the top of the eForm.
3. In the first "Select Project" field, begin typing the name or number of the project that holds the first file you want to compare. A dropdown menu will appear, containing all of the projects that contain the characters you just typed. Select a project and its file structure will appear in the "Select File" field. *As you type more characters, the list of possible projects should shrink.*
4. Repeat Step 3 in the second "Select Project" field for the project that holds the second file you want to compare.
5. In each "Select File" field, navigate to the files you want to compare and click the radio button for each file.
6. Click the Compare Selected Files 

button to open the Brava Viewer. The Brava Viewer is configured to load two versions side-by-side as the default view, and the "Open File" will always be on the left. You can also overlay the two files, viewing only elements that have been added (green), elements that have been deleted (red) and elements that remain unchanged between the two files. The toolbar at the bottom of the screen allows you to toggle between the different views.





Overlay - Places the two versions on top of one another.

Overlay Differences - Shows elements that have been added to Version 2 (in green), deleted from Version 1 (in red) and remain unchanged (in grey).

Side-by-Side - Shows the two versions next to each other (default view).

Version 1 - Shows the older version only.

Version 2 - Shows the newer version only.

Additions - Shows only elements that have been added to Version 2 (in green).

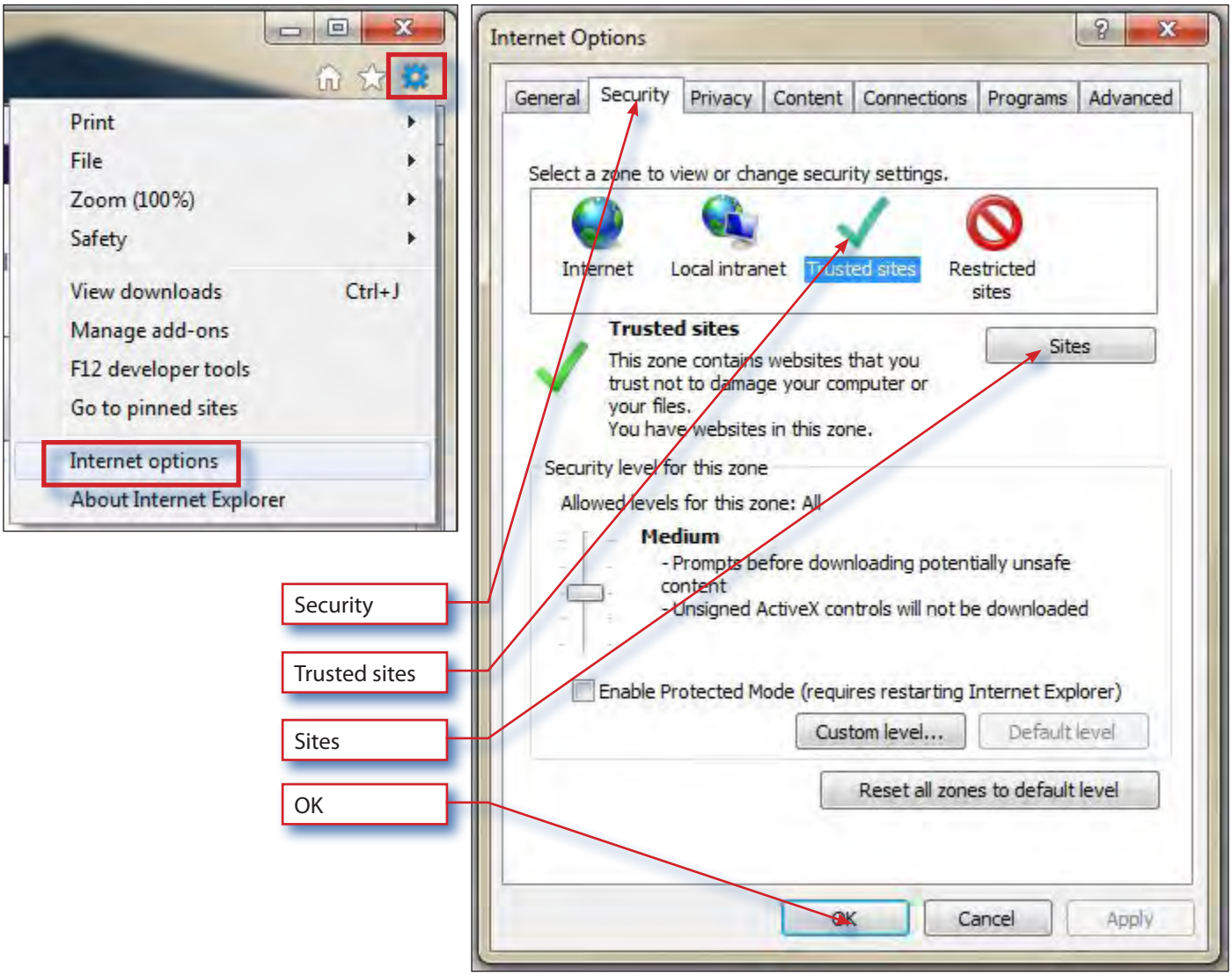
Deletions - Shows only elements that have been deleted from version 1 (in red).

Unchanged - Shows only elements that have not changed between versions (in grey).

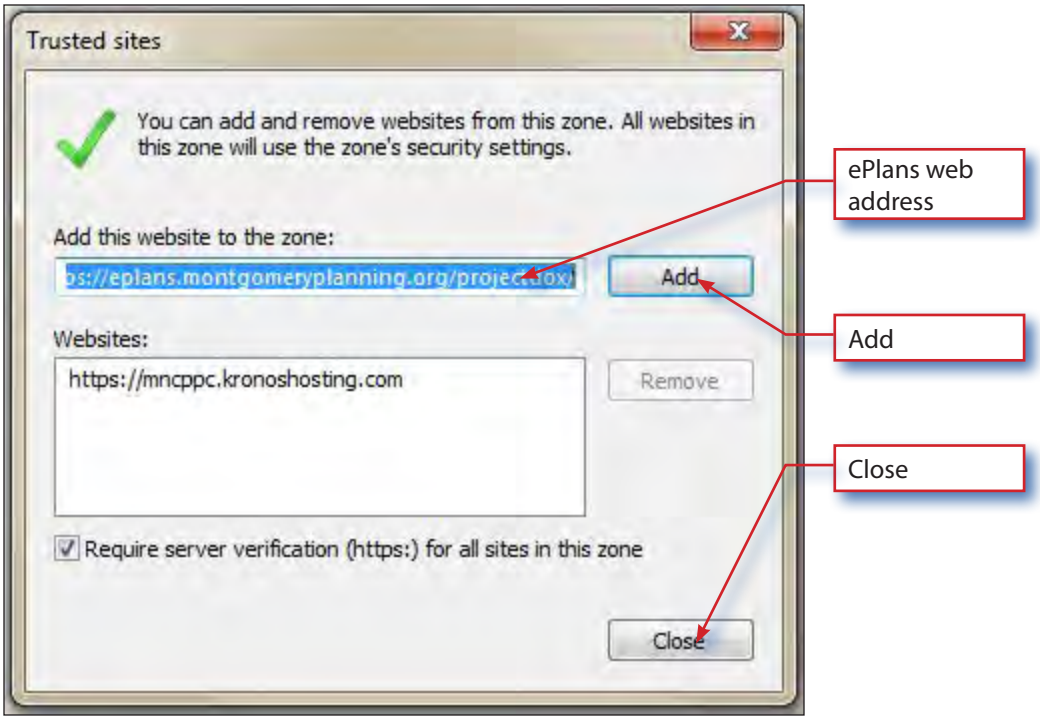
APPENDIX

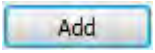
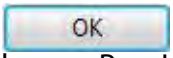
Allow Trusted Sites

Depending on your internet browser's settings, you may need to verify that ePlans is recognized as a Trusted Site. Because of the amount of information transmitted between your computer and the ePlans server, your browser may mistakenly identify ePlans as a malicious website. By identifying it as a trusted site, you can ensure your browser will allow you to safely access ePlans. The following steps apply to Internet Explorer, but similar steps can be followed for other browsers.



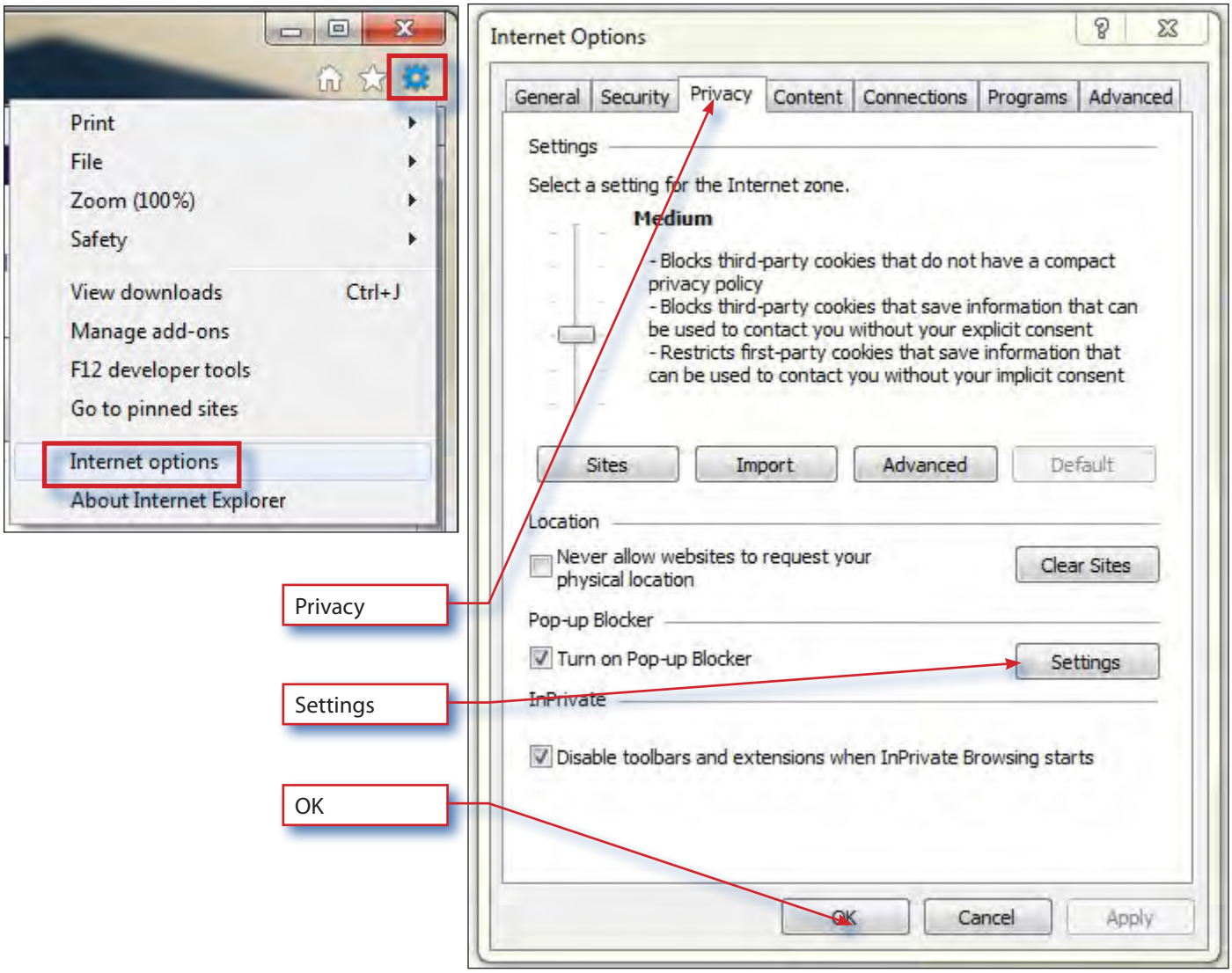
1. Open Internet Explorer and click the Tools button at the top-right corner of the window. Select "Internet options" from the dropdown menu. The Internet Options Menu will open in a new window.
2. Click the "Security" tab and then select the "Trusted sites" zone to activate the Sites button.
3. Click the Sites button to open the Trusted sites dialog box.


Trusted sites
You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.
Add this website to the zone:
Add
Websites:
https://mncppc.kronoshosting.com
Remove
Require server verification (https:) for all sites in this zone
Close
ePlans web address
Add
Close

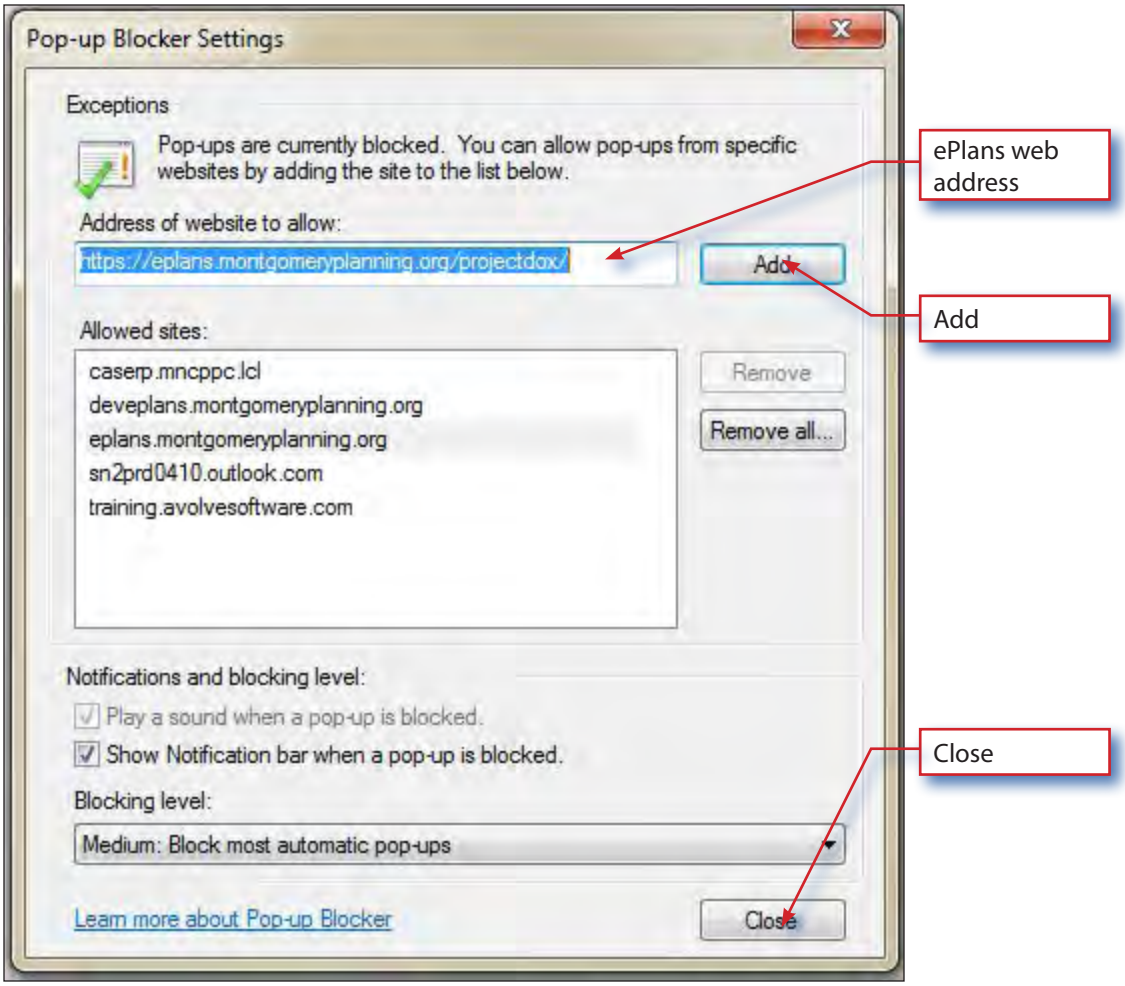
4. Type or paste the main ePlans web address (https://eplans.montgomeryplanning.org/projectdox) and click the Add  button.
5. Click the Close button to return to the Internet Options menu.
6. Either click the OK  button to return to Internet Explorer, or follow the instructions on the next page to disable your Pop-Up Blocker

Disabling Pop-Up Blocker

For ePlans to function properly, the platform must be able to automatically open new windows within your internet browser. To make sure the browser allows this, you will need to disable the Pop-Up Blocker for ePlans. The following steps apply to Internet Explorer, but similar steps can be followed for other browsers.



1. Open Internet Explorer and click the Tools icon at the top-right corner of the window. Select "Internet Options" from the dropdown menu. The Internet Options menu will open in a new window.
2. Click the Privacy tab
3. Click the Settings button to open the Pop-up Blocker Settings dialog box.



4. Type or paste the main ePlans web address (https://eplans.montgomeryplanning.org/projectdox) and click the Add [Add] button.
5. Click the Close [Close] button to return to the Internet Options Menu.
6. Click the OK [OK] button to return to Internet Explorer.

Park Facility Codes

Each project created within ePlans is assigned a unique project number, consisting of several pieces of information that relate directly to the location, timing and type of work being done. The first component of the project number is the Park Facility Code. Every facility within Montgomery County Parks has a unique Facility Code consisting of a letter followed by a two-digit number. All of the Park Facility Codes for Montgomery County Parks are listed below.

E24	Aberdeen Local Park
A01	Acorn Urban Park
S01	Adventure Conservation Park
K01	Agricultural History Farm Park
E70	Airy Hill Local Park
C01	Arctic NCA
B28	Amity Drive Neighborhood Park
D02	Aquarius Local Park
D03	Arcola Local Park
D04	Argyle Local Park
F22	Arora Hills Local Park
F01	Aspen Hill Local Park
F10	Avenel Local Park
D05	Ayrlawn Local Park
D12	Batchellors Forest Local Park
A03	Battery Lane Urban Park
M01	Bauer Drive Local Park
X90	Beach Drive Parkway
B81	Becca Lilly Neighborhood Park
D06	Bedfordshire Neighborhood Park
B01	Bel Pre Neighborhood Park
C02	Beret NCA
C45	Berryville Park NCA
M21	Bethesda Swimming Pool Property
D08	Beverly Farms Local Park
D09	Big Pines Local Park
C03	Birch Drive NCA
M48	Black Hill Boat Rental Area
N27	Black Hill Maintenance Yard
M57	Black Hill Nature/Visitors Center Property
N29	Black Hill Park Police Substation Property
G07	Black Hill Regional Park
M46	Black Rock Mill
F20	Blair Local Park
X03	Blake High School Property
S02	Blockhouse Point Conservation Park
D10	Blueberry Hill Local Park
F16	Blunt Road Local Park
C26	Bonifant NCA
J01	Booze Creek Stream Valley Park
C38	Boundary Park NCA
D11	Bowie Mill Local Park
F21	Boyds Local Park
C04	Bradley Hills NCA
D13	Bradley Local Park
B02	Breewood Neighborhood Park
J02	Broad Run Stream Valley Park
D14	Broadacres Local Park
B65	Brookdale Neighborhood Park
B03	Brookmont Neighborhood Park
M03	Brookside Gardens
M04	Brookside Nature Center Property
D15	Brookview Local Park
C46	Browns Corner NCA

B04	Buck Branch Neighborhood Park
J03	Buck Branch Stream Valley Park
J04	Bucklodge Branch Stream Valley Park
S12	Bucklodge Conservation Park
E57	Bullis Local Park
D17	Burning Tree Local Park
N31	Burnt Mills East Special Park
N34	Burnt Mills West Special Park
D18	Burtonsville Local Park
J05	Cabin Branch Stream Valley Park
M43	Cabin John Action Playland
M24	Cabin John Athletic Area
M35	Cabin John Family Picnic Area
M36	Cabin John Group Camping Area
M33	Cabin John Group Picnic Area
M99	Cabin John Hq Property
M06	Cabin John Ice Rink Property
N38	Cabin John Indoor Tennis Property
D19	Cabin John Local Park
M34	Cabin John Maintenance Yard Property
M49	Cabin John Mini Train Property
G01	Cabin John Regional Park
J06	Cabin John Stream Valley Park
P04	Cabin John Stream Valley Park Unit 1
P05	Cabin John Stream Valley Park Unit 2
P06	Cabin John Stream Valley Park Unit 3
P07	Cabin John Stream Valley Park Unit 4
P08	Cabin John Stream Valley Park Unit 5
P71	Cabin John Stream Valley Park Unit 6
L16	Callithea Farm Special Park
F03	Calverton Galway Local Park
B05	Calverton NCA
L02	Camp Seneca Special Park
D20	Cannon Road Local Park
H06	Capital Crescent Trail Special Park
A29	Capital View Open Space Urban Park
D21	Capital View-Homewood Local Park
C06	Carderock Springs NCA
A08	Caroline Freeland Urban Park
D01	Carroll Knolls Local Park
M07	Carson Farm Special Park
D22	Cashell Neighborhood Park
E64	Cedar Creek Local Park
S10	Cedar Island Conservation Park
F17	Centerway Local Park
T50	Charles Browning Farm
C07	Charred Oak NCA
A04	Chase Avenue Urban Park
A05	Cheltenham Drive Urban Park
D82	Cherrywood Local Park
D24	Chevy Chase Local Park
C47	Chevy Chase Open Space Urban Park
B83	Cindy Lane Neighborhood Park
E47	Clarksburg Neighborhood Park
A31	Clarksburg Triangle Urban Park
E23	Clarksburg Village North Local Park
D27	Clearspring Local Park
D29	Cloverly Local Park
D30	Colesville Local Park
B06	Colesville Manor Neighborhood Park
B07	College View Neighborhood Park
B75	Colt Terrace Neighborhood Park
F02	Columbia Local Park
E58	Concord Local Park
B72	Connecticut Avenue Neighborhood Park
B08	Countryside Neighborhood Park

J07	Crabbs Branch Stream Valley Park
E74	Cross Creek Club Local Park
B09	Dale Drive Neighborhood Park
B10	Damascus Neighborhood Park
G02	Damascus Recreational Park
K09	Darby Historical/Cultural Park
A26	Darnestown Heritage Park
D31	Darnestown Local Park
A06	Dartmouth NCA
B86	Derwood Station Neighborhood Park
D32	Dewey Local Park
G03	Dickerson Conservation Park
D33	Dickerson Local Park
L03	Dowden's Ordinary Special Park
C08	Drake Drive NCA
B11	Druid Drive Neighborhood Park
J08	Dry Seneca Creek Stream Valley Park
P10	Dry Seneca Creek Stream Valley Unit 1
P75	Dry Seneca Creek Stream Valley Unit 2
D34	Dufief Local Park
C43	Duvall Road NCA
D35	East Norbeck Local Park
A07	East Silver Spring Urban Park
C30	East-West Highway NCA
B69	Edgewood Neighborhood Park
B76	Edith Throckmorton Neighborhood Park
D36	Ednor Local Park
N46	Ednor Recreation Building Property
A09	Ellsworth Urban Park
A10	Elm Street Urban Park
C10	Elmhirst Parkway NCA
X09	Emory Grove Community Garden Park
C37	Emory Grove Hills NCA
C11	English Court NCA
M38	English Manor Neighborhood Park
B12	Evans Parkway Neighborhood Park
C41	Fairdale Road NCA
M60	Fairland - Gunpowder Golf Course Property
G04	Fairland Recreational Park
A11	Fairview Road Urban Park
D38	Falls Road Local Park
D39	Farmland Drive Local Park
A12	Fenton Street Urban Park
D40	Fernwood Local Park
D41	Fleming Local Park
A13	Flower Avenue Urban Park
E50	Flower Hill Local Park
B13	Flower Valley Neighborhood Park
B14	Forest Glen Neighborhood Park
B16	Forest Grove Neighborhood Park
E71	Fountain Hills Local Park
B17	Fox Chapel Neighborhood Park
B18	Fox Hills West Neighborhood Park
B19	Garrett Park - Waverly Neighborhood Park
D43	Garrett Park Estates Local Park
B20	General Getty Neighborhood Park
D44	Georgian Forest Local Park
D45	Germantown East Local Park
A25	Germantown Square Urban Park
A28	Germantown Town Center Urban Park
B21	Glen Echo Heights Neighborhood Park
B22	Glen Haven Neighborhood Park
F05	Glen Hills Local Park
B23	Glen Mar Neighborhood Park
D47	Glenfield Local Park
A27	Glenmont Greenway Urban Park

D48 Glenmont Local Park
D49 Good Hope Local Park
J09 Goshen Branch Stream Valley Park
S13 Goshen Elm Conservation Park
G05 Goshen Recreational Park
J10 Great Seneca Stream Valley Park
P78 Great Seneca Stream Valley Park Unit 1
P79 Great Seneca Stream Valley Park Unit 2
P80 Great Seneca Stream Valley Park Unit 3
P81 Great Seneca Stream Valley Park Unit 4
P82 Great Seneca Stream Valley Park Unit 5
P83 Great Seneca Stream Valley Park Unit 6
P84 Great Seneca Stream Valley Park Unit 7
P85 Great Seneca Stream Valley Park Unit 8
P86 Great Seneca Stream Valley Park Unit 9
S03 Green Farm Conservation Park
E59 Greenbriar Local Park
B87 Greenway Village Neighborhood Park
B24 Greenwich Neighborhood Park
D51 Greenwood Local Park
B70 Gregerscroft Neighborhood Park
E53 Griffith Local Park
H01 Gude Drive Recreational Park
D52 Gunner's Branch Local Park
D53 Gunner's Lake Local Park
C33 Gunner's Village NCA
B25 Harmony Hills Neighborhood Park
C13 Hastings NCA
J11 Hawlings River Stream Valley Park
B54 Heritage Farm Neighborhood Park
B26 Highland Stone Neighborhood Park
D54 Hillandale Local Park
B27 Hillmead Neighborhood Park
B82 Hillwood Manor Neighborhood Park
L18 Historic Hyattstown Open Space Special Park
B84 Hopefield Neighborhood Park
S15 Hoyles Mill Conservation Park
E68 Hoyles Mill Village Local Park
D23 Hunters Woods Local Park
C35 Hunters Woods NCA
D55 Indian Spring Terrace Local Park
C40 Inverness Forest NCA
D56 Jesup-Blair Local Park
B29 John Haines Neighborhood Park
D37 Johnson Local Park
B30 Jones Mill Road Neighborhood Park
L17 Josiah Henson Special Park
E67 Juniper-Blair Neighborhood Park
X05 Kauffman Park (Montgomery Village)
D57 Kemp Mill Estates Local Park
A14 Kemp Mill Urban Park
D58 Ken-Gar Palisades Local Park
D59 Kensington Cabin Local Park
B31 Kensington Heights Neighborhood Park
J12 Kensington Parkway Stream Valley Park
B32 Kensington-Frederick Avenue Neighborhood Park
J13 Kilgour Branch Stream Valley Park
X07 King Street Community Garden
E69 Kings Crossing Local Park
D61 Kings Local Park
D83 Kingsview Local Park
A15 Kramer Urban Park
F06 Layhill Local Park
D63 Layhill Village Local Park
H09 Laytonia Recreational Park

D64	Laytonsville Local Park
D46	Leaman Local Park
B74	Leland Neighborhood Park
C31	Leland-Beach Triangle NCA
M53	Little Bennett Camp Ground
J14	Little Bennett Creek Stream Valley Park
M52	Little Bennett Golf Course Property
N26	Little Bennett Maintenance Yard Property
G06	Little Bennett Regional Park
J15	Little Falls Stream Valley Park
P17	Little Falls Stream Valley Park Unit 1
P18	Little Falls Stream Valley Park Unit 2
J16	Little Seneca Greenway Stream Valley Park
J17	Little Seneca Stream Valley Park
P19	Little Seneca Stream Valley Park Unit 1
P20	Little Seneca Stream Valley Park Unit 2
P21	Little Seneca Stream Valley Park Unit 3
P22	Little Seneca Stream Valley Park Unit 4
M25	Locust Grove Nature Center Property
B33	Locust Hill Neighborhood Park
D65	Long Branch Local Park
J18	Long Branch Stream Valley Park
P24	Long Branch Stream Valley Unit 1
P73	Long Branch Stream Valley Unit 1A
P76	Long Branch Stream Valley Unit 3
B66	Long Branch-Arliss Neighborhood Park
B77	Long Branch-Garland Neighborhood Park
D66	Long Branch-Wayne Local Park
D67	Longwood Local Park
D68	Luxmanor Local Park
D69	Lynnbrook Local Park
J19	Magruder Branch Stream Valley Park
P25	Magruder Branch Stream Valley Park Unit 1
P77	Magruder Branch Stream Valley Park Unit 2
C48	Maiden Lane Urban Park
E65	Manor Oaks Local Park
C36	Manor Park NCA
X06	Maple Avenue Community Garden
D71	Maplewood-Alta Vista Local Park
M20	Margaret Schweinhaut Center Property
N32	Martin Luther King Jr. Maintenance Yard
H02	Martin Luther King Recreational Park
J20	Matthew Henson State Park Stream Valley Park
L09	Matthew Henson State Park Unit 1
L11	Matthew Henson State Park Unit 2
L19	Matthew Henson State Park Unit 3
L20	Matthew Henson State Park Unit 4
S04	Maydale Conservation Park
L01	Mccrillis Gardens Special Park
B34	Mckenney Hills Neighborhood Park
S08	Mcknew Conservation Park
E36	Mcknew Local Park
B62	White Flint Neighborhood Park
N22	Meadowbrook Annex Property
F08	Meadowbrook Local Park
N03	Meadowbrook Maintenance Yard Property
M09	Meadowbrook Riding Stables Property
D72	Meadowood Local Park
M10	Meadowside Nature Center Property
B35	Merrimac Neighborhood Park
A16	Metro Urban Park
C15	Middlebrook Hill NCA
D74	Middlevale Neighborhood Park
C42	Miles Road NCA
J21	Mill Creek Stream Valley Park
D75	Mill Creek Towne Local Park

X02	Milton M. Kaufmann Park
C16	Mineral Springs NCA
B36	Montgomery Hills Neighborhood Park
N15	Montgomery Parks Landfill Property
N05	Montgomery Regional Office-Mro Property
D76	Mount Zion Local Park
C17	Moyer Road Local Park
J22	Muddy Branch Stream Valley Park
P27	Muddy Branch Stream Valley Park Unit 1
P28	Muddy Branch Stream Valley Park Unit 2
P29	Muddy Branch Stream Valley Park Unit 3
E56	Muncaster Manor Local Park
H03	Muncaster Recreational Park
M50	Needwood Boat Rental Area
N06	Needwood Mansion Property
M56	Needwood Snack Bar Area
M08	Needwood Visitor Center Property
B37	New Hampshire Estates Neighborhood Park
S11	New Hope Island Conservation Park
D77	Newport Mill Local Park
E62	Nike Missile Local Park
D78	Nolte Local Park
B38	Norbeck Meadows Neighborhood Park
B39	Norbeck-Muncaster Mill Neighborhood Park
J23	North Branch Stream Valley Park
P30	North Branch Stream Valley Park Unit 2
P31	North Branch Stream Valley Park Unit 3
P32	North Branch Stream Valley Park Unit 4
D79	North Chevy Chase Local Park
D80	North Four Corners Local Park
D81	North Gate Local Park
J24	North Germantown Grnway Stream Valley Park
C18	North Point NCA
G08	Northwest Branch Recreational Park
J25	Northwest Branch Stream Valley Park
P34	Northwest Branch Stream Valley Park Unit 3
P35	Northwest Branch Stream Valley Park Unit 4
P36	Northwest Branch Stream Valley Park Unit 5
P37	Northwest Branch Stream Valley Park Unit 7
D07	Norwood Local Park
C19	Norwood Village NCA
H04	Oak Ridge Conservation Park
X98	Oakland Terrace Elementary School Property
C20	Old Farm NCA
B40	Olney Acres Neighborhood Park
D84	Olney Family Neighborhood Park
N33	Olney Manor Maintenance Yard Propertry
H05	Olney Manor Recreational Park
B41	Olney Mill Neighborhood Park
B42	Olney Square Neighborhood Park
D85	Orchard Neighborhood Park
B67	Opal A. Daniels Neighborhood Park
P12	Ovid Hazen Wells Greenway
L07	Ovid Hazen Wells Recreational Park
D86	Owens Local Park
B43	Paint Branch Neighborhood Park
J26	Paint Branch Stream Valley Park
P38	Paint Branch Stream Valley Park Unit 4
P39	Paint Branch Stream Valley Park Unit 5
P40	Paint Branch Stream Valley Park Unit 6
F09	Parkland Local Park
M45	Parklawn Group Camping Area
M44	Parklawn Group Picnicking Area
D87	Parklawn Local Park
N09	Parkside Headquarters Property
S07	Patuxent River Watershed Conservation Park

C21	Peach Orchard NCA
B44	Peachwood Neighborhood Park
K06	Pennyfield Lock NCA
A17	Philadelphia Avenue Urban Park
E75	Piedmont Crossing Local Park
D88	Pilgrim Hill Local Park
D89	Pinecrest Local Park
D90	Pleasant View Local Park
D91	Plumgar Local Park
N11	Pope Farm Nursery
D62	Potomac Community Neighborhood Park
L06	Potomac Horse Center Special Park
C39	Potomac Palisades Conservation Park
B45	Quebec Terrace Neighborhood Park
D92	Quince Orchard Knolls Local Park
B46	Quince Orchard Valley Neighborhood Park
G09	Rachel Carson Conservation Park
D93	Randolph Hills Local Park
D94	Ray's Meadow Local Park
K08	Red Door Store Historical/Cultural Park
J27	Reddy Branch Stream Valley Park
P42	Reddy Branch Stream Valley Park Unit 1
P43	Reddy Branch Stream Valley Park Unit 2
P44	Reddy Branch Stream Valley Park Unit 3
D95	Redland Local Park
L13	Rickman Farm Horse Special Park
H07	Ridge Road Recreational Park
S14	River Road Shale Barrens Conservation Park
M37	Rock Creek Hills Local Park
N28	Rock Creek Maintenance Yard
M11	Rock Creek Needwood Golf Course
G10	Rock Creek Regional Park
J28	Rock Creek Stream Valley Park
P45	Rock Creek Stream Valley Park Unit 1
P52	Rock Creek Stream Valley Park Unit 11
P53	Rock Creek Stream Valley Park Unit 12
P54	Rock Creek Stream Valley Park Unit 14
P55	Rock Creek Stream Valley Park Unit 15
P56	Rock Creek Stream Valley Park Unit 16
P46	Rock Creek Stream Valley Park Unit 2
P47	Rock Creek Stream Valley Park Unit 3
P48	Rock Creek Stream Valley Park Unit 4
P49	Rock Creek Stream Valley Park Unit 5
P50	Rock Creek Stream Valley Park Unit 6
P51	Rock Creek Stream Valley Park Unit 7
J29	Rock Run Stream Valley Park
X08	Rocking Horse Road Community Garden
L08	Rockwood Special Park
D96	Rosemary Hills-Lyttonsville Local Park
A18	Royce Hanson Urban Park
E54	Saddlebrook Local Park
C23	Saint Paul NCA
D98	Sangamore Local Park
D16	Santini Road Local Park
B47	Scotland Neighborhood Park
B48	Seek Lane Neighborhood Park
F18	Seneca Crossing Local Park
K02	Seneca Landing Special Park
F19	Seneca Springs Local Park
T89	Seneca Store Historical Park
S18	Serpentine Barrens Conservation Park East
S16	Serpentine Barrens Conservation Park North
S17	Serpentine Barrens Conservation Park South
D99	Seven Locks Local Park
B49	Seven Oaks Neighborhood Park
N12	Shady Grove Maintenance Yard Property

B71 Sherwood Forest Manor Neighborhood Park
C24 Sherwood Forest NCA
M61 Shirley Povich Field Property
B50 Silver Spring Intermediate Neighborhood Park
B51 Sligo Avenue Neighborhood Park
B52 Sligo Cabin Neighborhood Park
L04 Sligo Creek Golf Course Property
B80 Sligo Creek North Neighborhood Park
J30 Sligo Creek Stream Valley Park
P57 Sligo Creek Stream Valley Park Unit 1
P72 Sligo Creek Stream Valley Park Unit 1A
P58 Sligo Creek Stream Valley Park Unit 2
P59 Sligo Creek Stream Valley Park Unit 3
P60 Sligo Creek Stream Valley Park Unit 4
P61 Sligo Creek Stream Valley Park Unit 5
X04 Sligo Elementary School Property
C44 Sligo Mill NCA
B85 Sligo Mill Overlook Neighborhood Park
X92 Sligo Parkway Property
B53 Sligo-Bennington Neighborhood Park
E01 Sligo-Dennis Avenue Local Park
S09 Snowdens Mill Pond Property
X93 Somerset (County Property)
B15 South Four Corners Neighborhood Park
W99 South Germantown Maintenance Yard
O07 South Germantown Mini Golf/Splash Playground Area
M02 South Germantown Montgomery Tennisplex Property
G11 South Germantown Recreational Park
H08 South Germantown Soccerplex
E02 South Gunner's Branch Local Park
E03 Southeast Olney Local Park
E04 Spencerville Local Park
E05 Stewartown Local Park
C25 Stonecrest NCA
E06 Stonegate Local Park
E66 Stonehedge Local Park
E07 Stoneybrook Local Park
E08 Strathmore Local Park
E09 Stratton Local Park
E10 Strawberry Knoll Local Park
L15 Sugarland Special Park
F07 Sundown Road Local Park
E11 Takoma - Piney Branch Local Park
B78 Takoma Park Neighborhood Park
B79 Takoma Park South Neighborhood Park
A19 Takoma Urban Park
M58 Takoma-Langley Community Center Property
B55 Tamarack Neighborhood Park
E51 Tanglewood Neighborhood Park
S06 Ten Mile Creek Conservation Park
J31 Ten Mile Creek Greenway Stream Valley Park
E12 Tilden Woods Local Park
J32 Tilden Woods Stream Valley Park
E52 Timberlawn Local Park
B56 Tobytown Neighborhood Park
E72 Traville Local Park
M18 Trolley Museum Property
C27 Tuckerman NCA
C28 Twinponds NCA
B57 Unity Neighborhood Park
B68 Upper Long Branch Neighborhood Park
J33 Upper Paint Branch Stream Valley Park
E73 Upper Rock Creek Local Park
L05 Valley Mill Special Park

B58 Valleywood Neighborhood Park
E13 Veirs Mill Local Park
E14 Wall Local Park
D73 Waring Station Local Park
A30 Warner Circle Special Park
S19 Washington Grove Conservation Park
B59 Washington Square Neighborhood Park
N30 Waters House Special Park
E61 Waters Landing Local Park
J34 Watts Branch Stream Valley Park
P64 Watts Branch Stream Valley Park Unit 1
P65 Watts Branch Stream Valley Park Unit 2
P66 Watts Branch Stream Valley Park Unit 3
P67 Watts Branch Stream Valley Park Unit 4
P70 Waverly-Schuylkill Neighborhood Park
B60 Wells Neighborhood Park
B61 Wembrough Neighborhood Park
E15 West Fairland Local Park
E16 Westmoreland Hills Local Park
M28 Wheaton Athletic Area
M41 Wheaton Carousel Property
M30 Wheaton Children's Play Center
M15 Wheaton Community Building Property
M29 Wheaton Family Picnic Area
E17 Wheaton Forest Local Park
M26 Wheaton Group Camping Area
N40 Wheaton Ice Rink Property
M31 Wheaton Indoor Tennis Property
M62 Wheaton In-Line Property
M27 Wheaton Maintenance Yard Property
N93 Wheaton Mini Train Property
M54 Wheaton Picnic Snack Bar Area
G12 Wheaton Regional Park
N08 Wheaton Shorefield House Property
N39 Wheaton Sports Pavilion Property
M17 Wheaton Stables Property
A20 Wheaton Veteran's Urban Park
E18 Wheaton Woods Local Park
E19 Wheaton-Claridge Local Park
E20 Whittier Woods Local Park
J35 Wildcat Branch Stream Valley Park
P74 Wildcat Branch Stream Valley Park Park Unit 1
P62 Wildcat Branch Stream Valley Park Park Unit 3
B63 Willard Avenue Neighborhood Park
E21 Winding Creek Local Park
C29 Windsor NCA
E55 Winter's Run Local Park
M63 Wisconsin Place Property
F12 Wood Local Park
E22 Woodacres Local Park
E63 Woodfield Local Park
K03 Woodlawn Cultural Special Park
N35 Woodlawn Manor Historic House Property
A21 Woodside Urban Park
L14 Woodstock Equestrian Park
B64 Wyngate Woods Neighborhood Park
T47 Zeigler Farm

GLOSSARY

Activity Instructions – Directions for completing a task. Activity Instructions can be found in a yellow text box at the top of every eForm.

Approve – The documents being reviewed are acceptable. Clicking the Approve button in an eForm will move the workflow to the next task. In most cases, clicking the Approve button cannot be undone.

Brava Viewer – The program within ePlans that allows you to view and comment on drawings. See page 35 for basic viewing instructions. See page 49 for a description of Compare Mode. See page 74 for instructions on making Changemarks. Go to ftp://ftp.infograph.com/brava/Brava_7.0_Tool_Tips.pdf for further information.

Changemark – Annotations made on top of drawing files within the Brava Viewer as part of a document review. Changemarks are the primary means of making comments on drawings within the ePlans platform. See page 74 for instructions on making Changemarks.

Checkbox - A graphic element that allows users to make multiple selections from a number of options.

= Unchecked Checkbox

= Checked Checkbox

Compare Mode - A feature of the Brava Viewer that allows users to place two files on top of one another or side-by-side to compare similarities and differences. See page 49 for more information.

Complete – The task is finished. Clicking the "Complete" button in an eForm will move the Workflow to the next task. In most cases, clicking the "Complete" button cannot be undone.

Consultant - A person or group hired by the Park Development Division to complete a set of contract documents for a specific park development project. The Consultant is responsible for uploading their documents to ePlans for review by the Project Manager and the PDCO Team. The Consultant will also receive and respond to comments made by the Project Manager and PDCO Team. See page 57 for an overview of all of the Consultant's tasks in a Workflow.

Dialog Box – A window that appears, containing a message and requiring a user to take a certain action. The simplest type of dialog box is an alert that requires the user to click the "OK" button to move on.

Division Chief - A member of Montgomery County Parks' Park Development Division, responsible for overseeing all Project Managers. Standard practices require the Division Chief to apply his or her eSignature to the cover sheet of any set of construction drawings before they go out to bid. See page 85 for an overview of the Division Chief's tasks within a Workflow.

eForm – The digital form that appears at the beginning of each task in a Workflow. eForms contain a number of components including instructions about completing the task-at-hand, document review types and due dates, messages between various user groups in a Workflow, access to reference checklists and lists of comments made on a drawing.

ePlans - An online document review, storage and submittal platform tailored for the Park Development Division of Montgomery County Parks, using Avolve software for ProjectDox. Also referred to as ProjectDox. See page 8 for an overview of ePlans.

eSignature – A scanned copy of one's signature that serves as a digital verification that a set of contract documents are complete and ready to be sent to contractors for bidding. The eSignature is the final step in the Workflow, applied to the cover sheet by the Division Chief. See page 89 for an overview.

Global Compare - A feature that allows a user to compare two files in the Brava Viewer, regardless of their location in ePlans. See page 107 for an overview.

Group – A collection of related users, responsible for completing similar tasks within a workflow. See page 9 for a description of all of the project user groups or roles.

Main Toolbar – A group of buttons found at the top right corner of most screens in ePlans that provide primary navigation functions. See page 20 for a description of all functions within the main toolbar.

PDCO Team – Planning, Design, Construction and Operations Team. A group of internal stakeholders from across the Montgomery County Parks Department that provide input during the design and construction stages of park development projects. See page 69 for an overview of the PDCO Team's tasks in the Workflow.

Pre-Screen Review – A review of Consultant's drawings conducted by the Project Manager to ensure the drawings are acceptable to send on to the PDCO Team for their review. This is the second step in the Workflow. See page 33 for further information about the Pre-Screen Review.

ProjectDox – A web-enabled collaboration platform that empowers the stakeholders in a project to manage information, communication, activity and resources in ways not possible by manual, conventional means. Also referred to as ePlans. See page 8 for an overview.

Project List – Basic information about every project assigned to a particular user. This list is visible in the Active Projects screen, immediately after logging in. See page 18.

Project Manager - A member of the Park Development Division of Montgomery County Parks, responsible for overseeing all aspects of park development projects. The Project Manager is listed as the "Project Coordinator" in the Project Info Page (See page 20). See page 24 for an overview of all of the Project Manager's tasks within the Workflow.

Project Role - See Group.

Project Template – A collection of default settings most commonly used for Park Development projects. The project template can be used as-is or customized to meet the needs of each specific project. Most projects will not require any changes to the template. The workflow described in this manual uses the "PARKS-Project" template. See page 27 for instructions on editing the project template.

QAP – Quality Assurance Program. An initiative of the Park Development Division to assure the professional quality and uniform format of construction documents.

QAP Checklist – A guide for Project Managers and Consultants to verify that construction documents meet the standards and requirements developed by the Park Development Division for document content and format prior to issuing them for procurement and construction. The QAP Checklist must be completed by the Project Manager and verified by the QAP Officer prior beginning the procurement process. See page 52 for instructions to the Project Manager on preparing the QAP Checklist. See page 79 for instructions to the QAP Officer on verifying the QAP Checklist.

QAP Officer - The last person to review a set of contract documents before they go out to bid. Following a standard checklist of requirements, the QAP officer ensures that a set of contract documents meets the standards set forth by Montgomery County Parks. See page 79 for an overview of all of the QAP Officer's tasks in the Workflow.

Radio Button - A graphic element that allows users to make only one selection from a number of options.

= Deselected Radio Button

= Selected Radio Button

Reaccept - To re-open a user's task once e or she has already completed it. Tasks can only be reaccepted within the current step of the Workflow, and only a Project Manager has the ability to reaccept a task on a user's behalf. See page 43 for instructions on how to reaccept a task.

Reassign - To give one user's task to another user. A Project Manager can reassign any unaccepted task from one user to another within the same group. A Project Manager can also reassign a task to himself or herself to advance a workflow. See page 38 for instructions on reassigning tasks.

Reject – The submitted documents are not acceptable and must be returned to their author for revisions before moving on. Clicking on the "Reject" button will restart the task at hand.

Review Cycle – The entire sequence of tasks required to complete a Workflow one time through.

Save and Close (Save & Close) – An option for users who wish to save their progress within a specific task and return to ePlans to complete the task at a later date. Clicking the "Save and Close" or "Save & Close" button in an eForm will save the user's progress and close the eForm window. To return to the eForm, click on the associated task within the Tasks List.

Step – One element within a task. All of the steps must be completed in sequence to complete a task.

System Administrator – An ePlans user with the highest level of permissions and access to all projects, folders and functionality. Contact a System Administrator with any troubleshooting questions or requests for additional permissions.

Tasks List – Information about any tasks within a Workflow that require the user's action. Clicking a task will take a user to the eForm for that task. Refer to Page 19 for an overview of the Tasks List.

Task – A step within the Workflow. Each task must be completed sequentially before moving on to the next task. The Project Manager has the ability to skip any task in a Workflow, with the exception of the QAP Checklist.

Task – Accepted – A task's status within the Task List that indicates the user responsible has started working on the task but is not yet finished. The task status changes from "Pending" to "Accepted" as soon as the user has clicked on the task in the Tasks List.

Task – Pending – A task's status within the Task List that indicates the user responsible has not yet begun working on the task. The task status changes from "Pending" to "Accepted" as soon as the user has clicked on the task in the Tasks List.

Task – Complete – A task's status within the Task List that indicates the user responsible has finished the task. The task status changes from "Accepted" to "Complete" as soon as the user clicks on the "Complete" or "Approved" button in the eForm.

User – An individual with an ePlans username and password. Users are separated into user groups and assigned specific tasks within a Workflow. See page 9 for a description of all of the user groups or roles.

Versioning – A feature of ePlans that allows users to upload multiple files of the same name and compare the differences from one version of a file to the next using Compare Mode in the Brava Viewer . The file's previous version is kept and logged in ePlan's history along with its associated markups. All topics and notes remain as a single record, containing a full file history of all versions of the file. Floating the cursor over the link to a file reveals to which version of the file a specific topic refers. See page 49 for a description of Compare Mode.

Workflow – One single, entire sequence of tasks that comprise a standard document review process, based on the Park Development Division's business process for construction document review. The entire Park Development Workflow can be seen on page 11.